Chapter 4 Other Personnel Actions

Process a Rehire (Former NAF Employees)

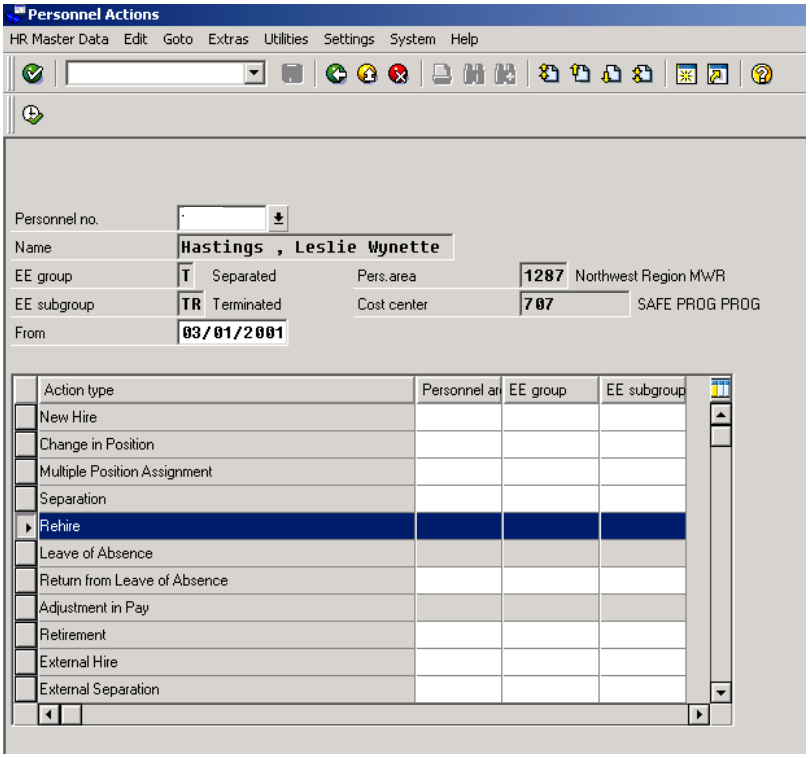
This procedure should be used to "rehire" when processing **former NAF employees**. All of these former employees should already be in the HR system. You will be required to enter the former employee's Personnel ID number.

This action uses the copy mode for several infotypes. It is important that you remember the information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

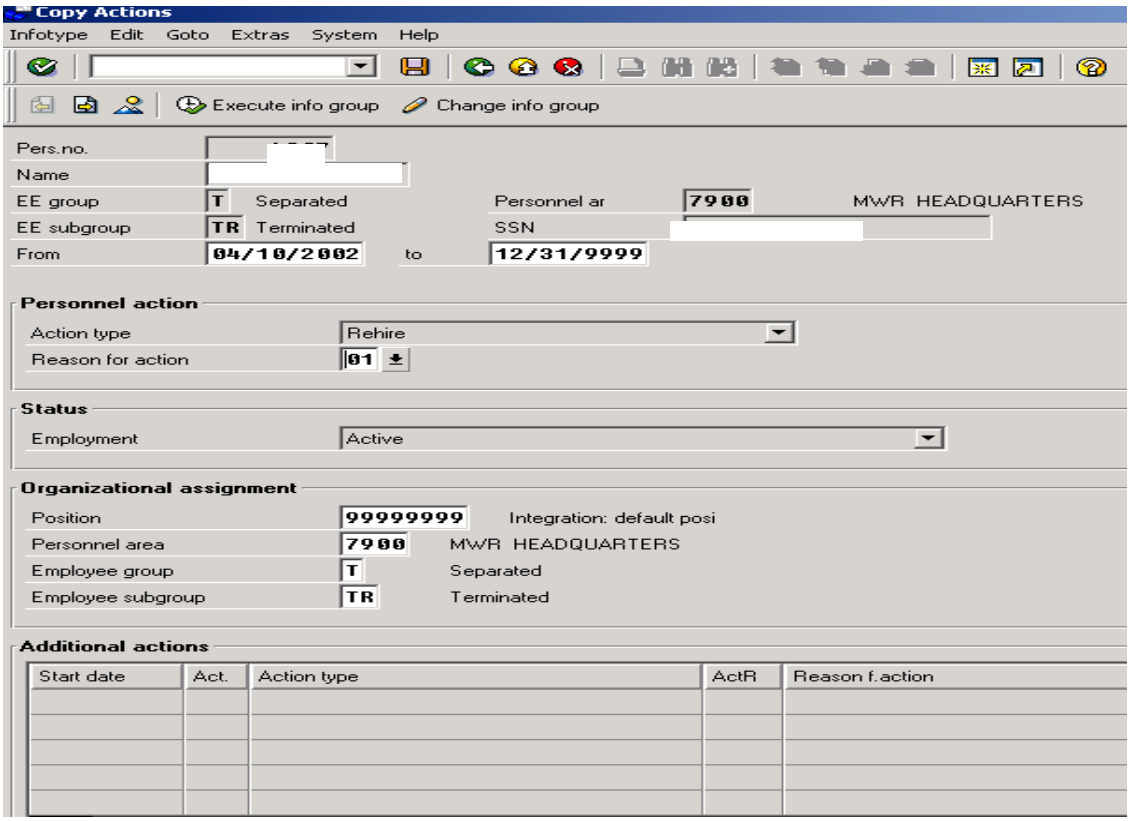
After you have entered your changes to an infotype and used the enter key, you should receive a message telling you that a previous entry will be delimited. This verifies that you want to make the change and that you previously have changed the "From Date" to reflect that your record will now be the current record. You will proceed through the message by using the Enter key and you will then be prompted to save your entries.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**



Press the Execute icon and the Infotype 0000 - Copy Actions screen is shown.



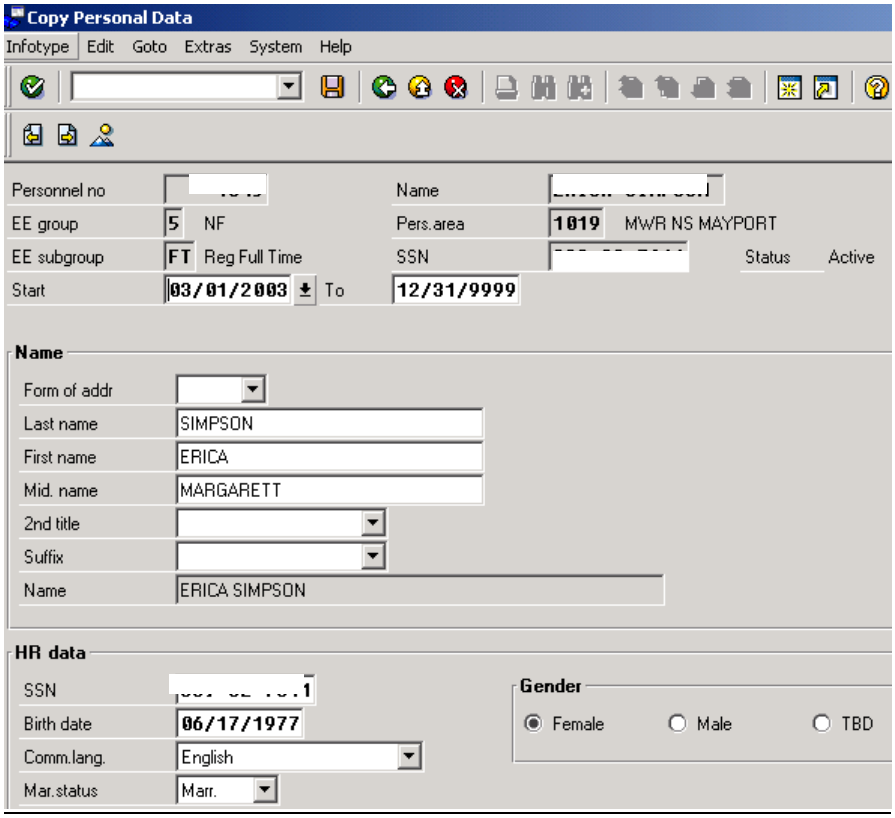
We will make various changes to this screen and they are reflected in the screen shot above.

Field Name	Description	R/O/C	User Action/Values
Action type	Rehire	R	Will default in
Reason for action	The reason the action is being performed	R	You may enter the action directly or use the dropdown menu to select.
Employment	User defined	R	Field will default in Active
Position	User defined	R	**Will default all 9s. Clear and enter position number or select from the drop down.**
Personnel Area	The assigned area of the position within the organization	R	**Clear the field before selecting Will default from the position number selected**
Employee Group	The group that the employee will be assigned to	R	**Clear the field before selecting Will default from the position number selected**
Employee Subgroup	The assigned subgroup for the employee	R	**Clear the field before selecting Use drop down arrow to select.**

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to save your entries.

Press the Save icon .

You will now see the next infotype in the rehire action series the Infotype 0002 – Copy Personal Data



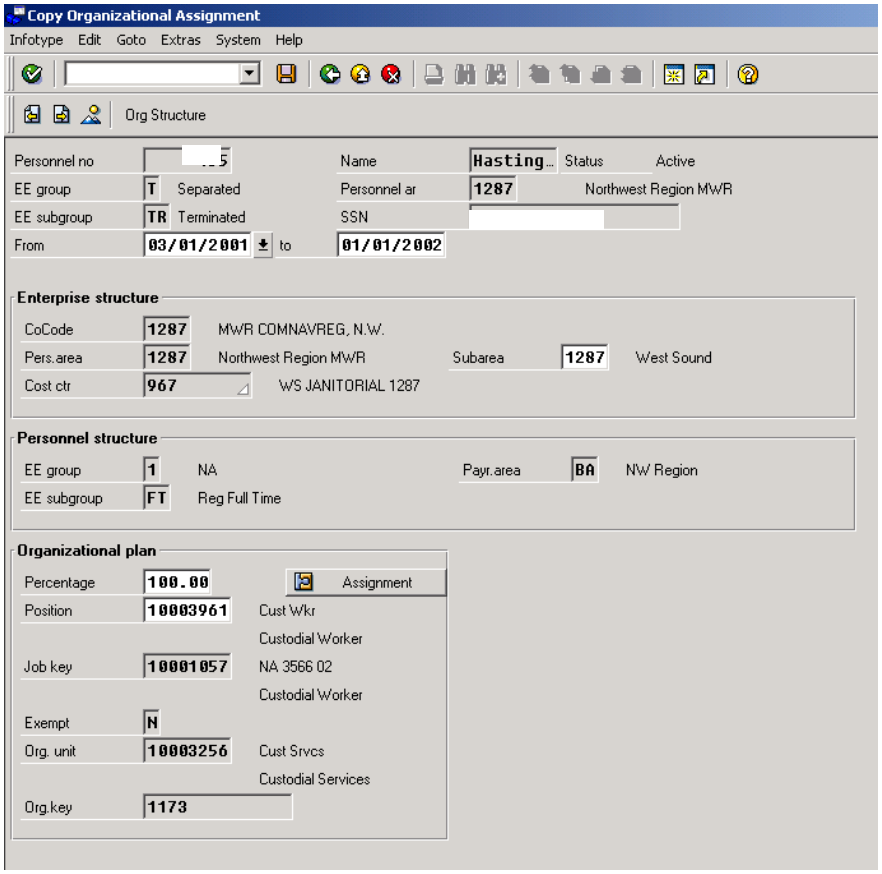
We have made no changes to infotype record so we validate the entries and save the record by clicking on the Save icon .

If there are any changes to any of these infotypes, make the changes and/or additions. If there are none and the information as stated on the infotype remains the same:

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to save your entries.

Press the Save icon .

The next infotype is 0001 – **Copy** Organizational Assignment as shown below.



Validate all the entries on the screen and then: Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

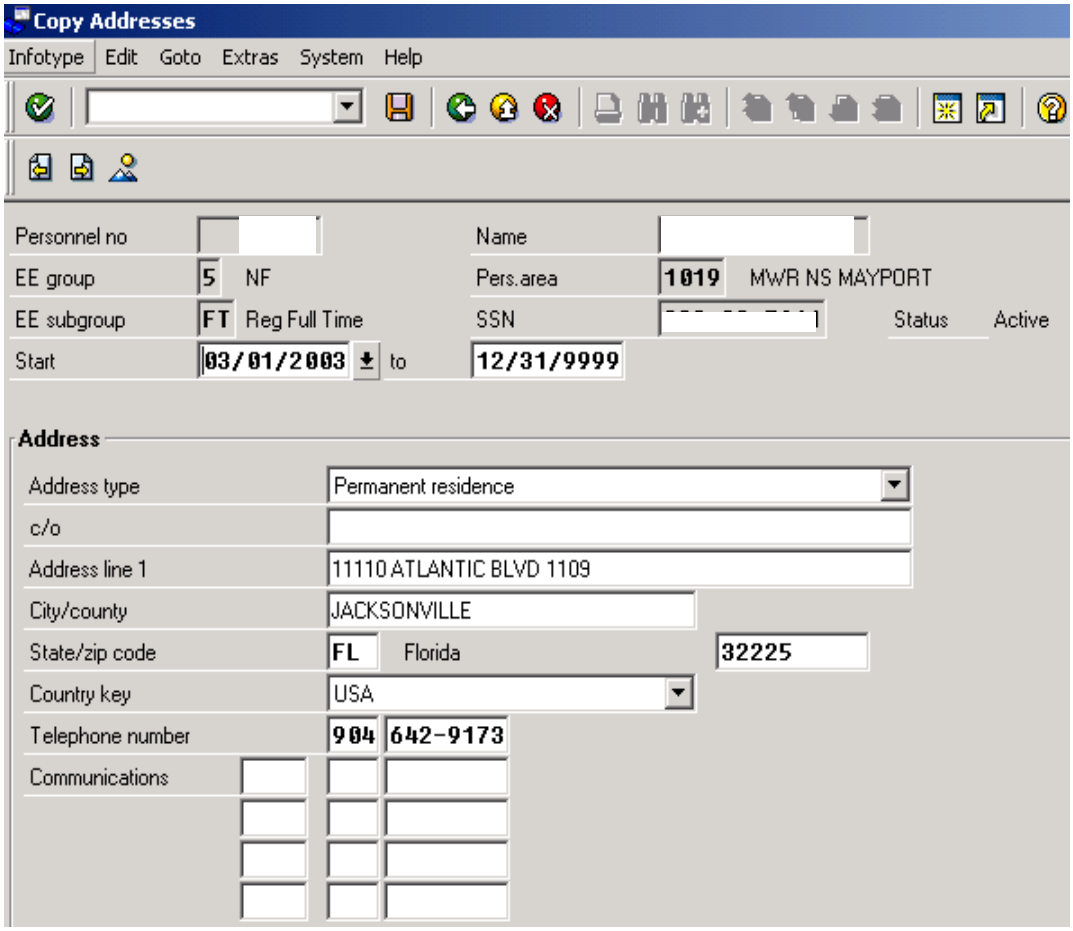
Press the Save icon .

As you go through the infotypes during the rehire process, validate the entries for accuracy, make the changes and/or additions as needed and:

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The next infotype 0006 – Copy Addresses appears.

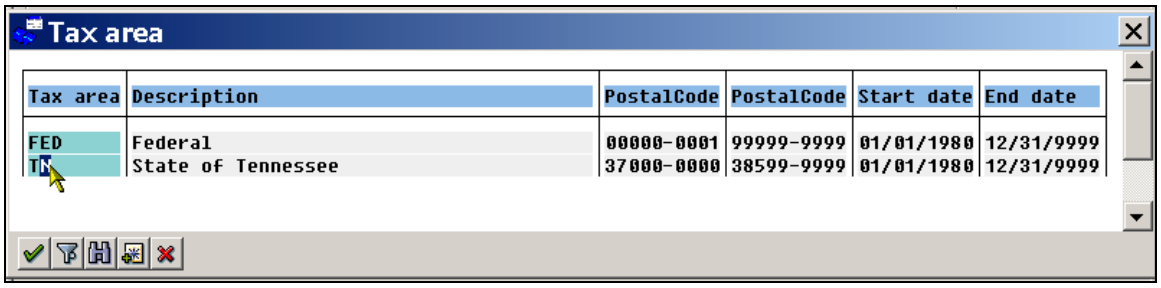


Again, there have been no changes in this information so we follow the same steps as before.

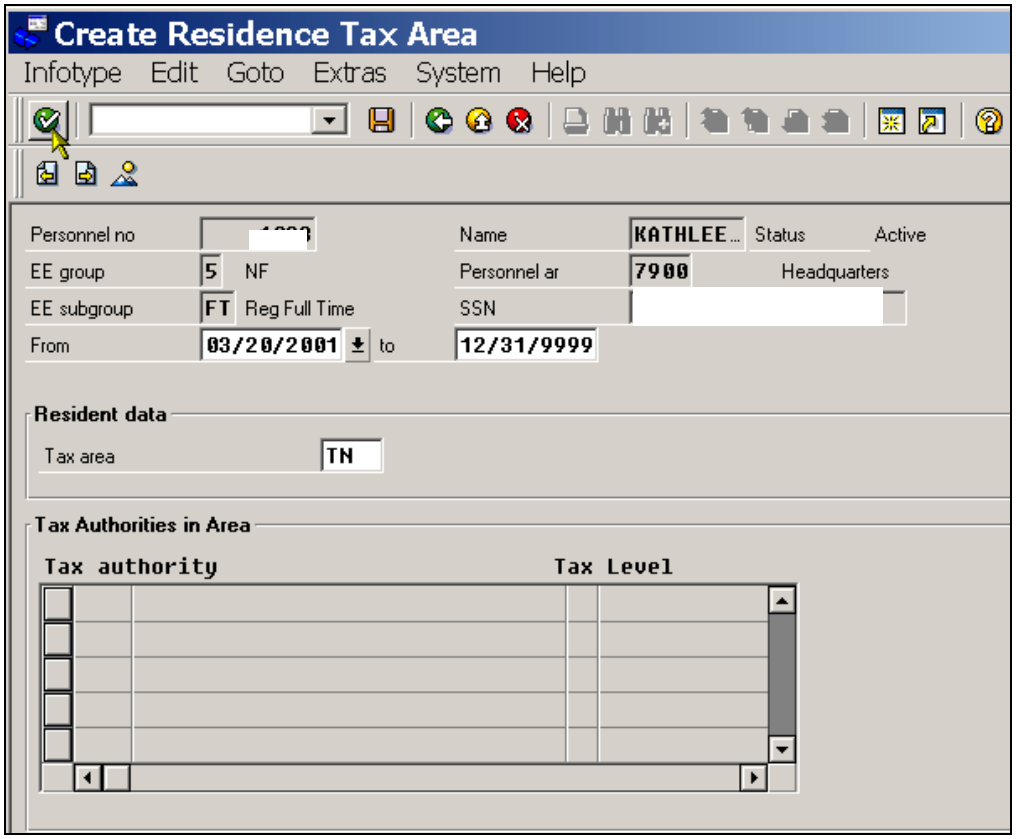
Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to save your entries.

Press the Save icon .

The next screen to appear is the Tax Area. Always select the **state of residence** on this pop up window.



Double click on state name or click once, then select the green check . This populates the tax area field on the next screen, Create Residence Tax Area.

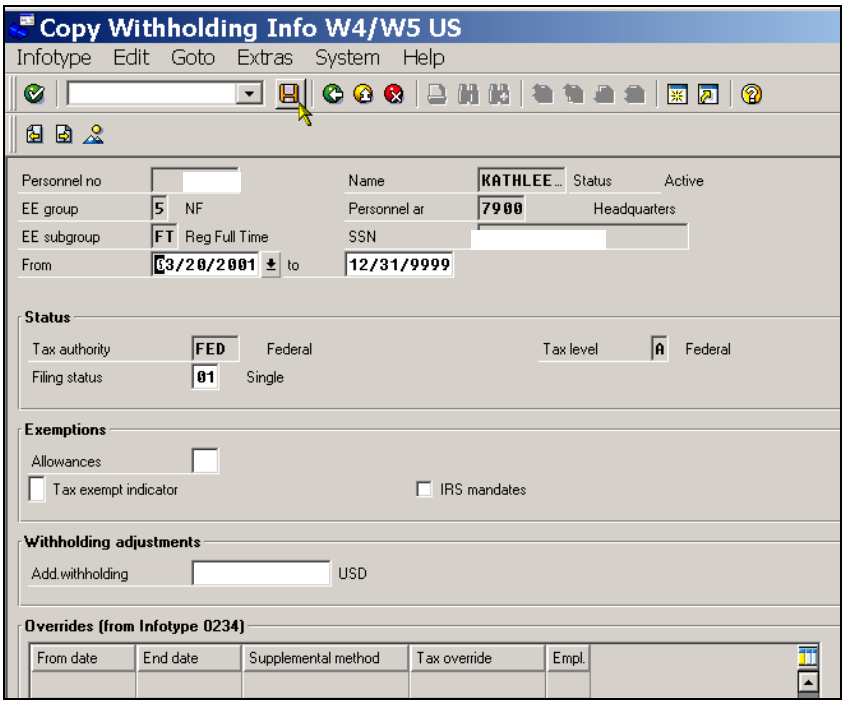


Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The next infotype is 0210-Withholding info W4/W5 US.

Enter the correct information and press the Enter icon and save.



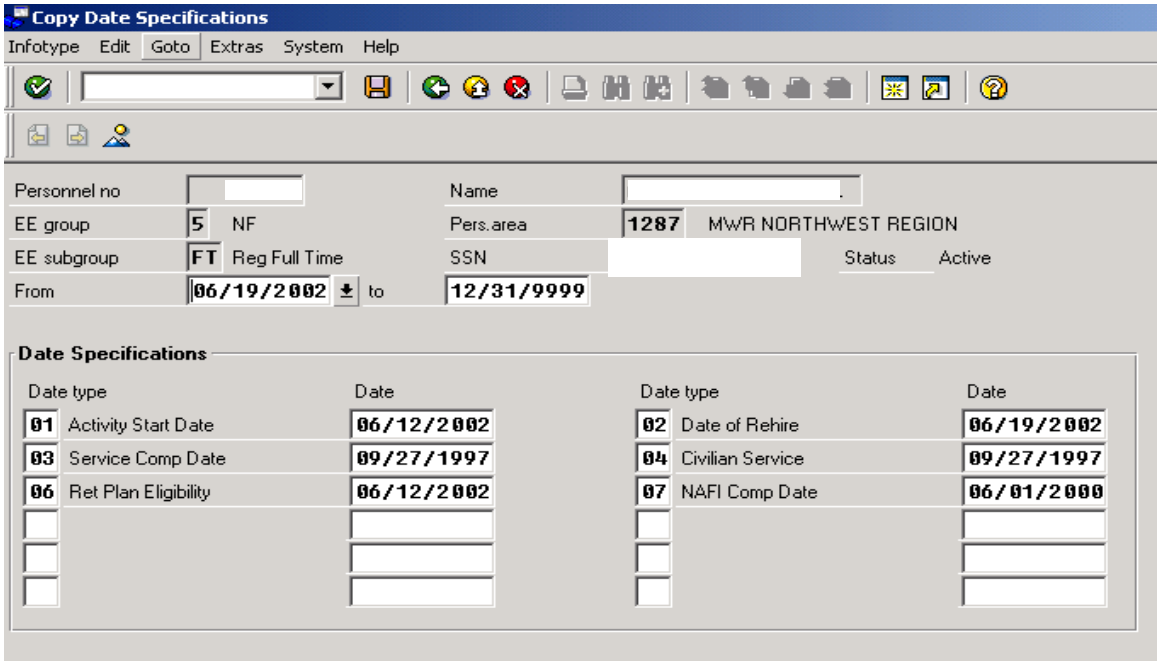
We have received a new W4 from the rehired employee and must make the changes to infotype 0210 – Withholding Info W4/W5 US. In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The next infotype in the process of rehiring an employee appears on the next page.

This is infotype 0041 – <u>Copy Date Specifications</u>



Update any fields necessary using the guidelines outlined below.

Date type 02 *Date of Rehire*, will populate with the rehire action date.

Date type 01 *Activity Start Date*, which is the first date of employment at the current activity. This date populates from the new hire action. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.

Date type 04 *Civilian Service Date,* which is the Comp date minus the active duty military time. In most cases, this will be the same as the Original hire date.

Date type 03 *Service Computation Date*, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

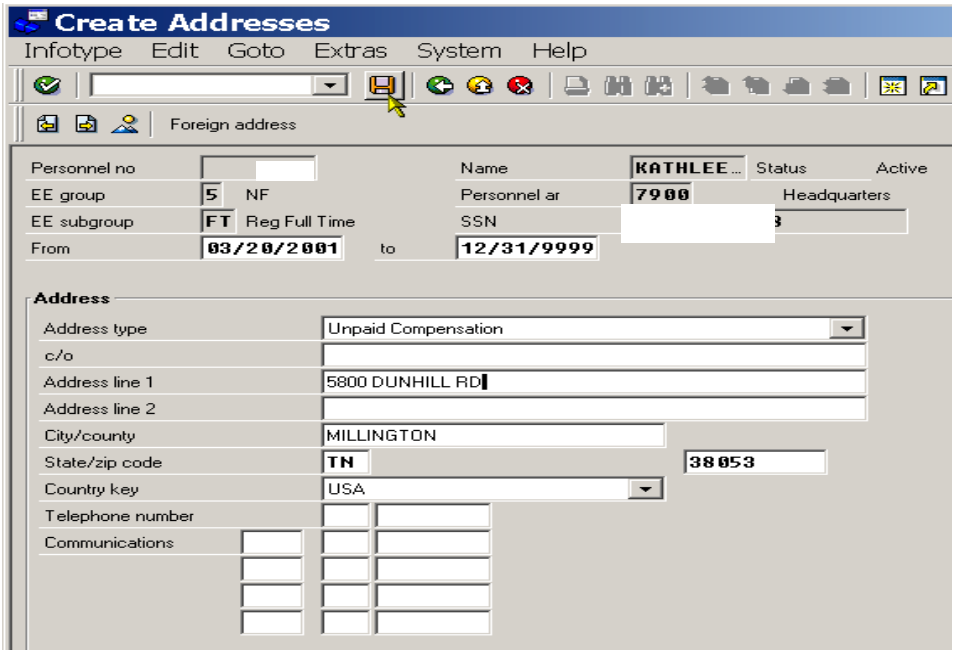
Date type 06 *Ret Plan Eligibility* is used for benefit retirement plan eligibility. This date will populate from the rehire action and must be changed to the correct date.

Date type 07 ***NAFI Computation Date*****,** the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable NAFI service and subtracting that total from the employee's most recent appointment.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

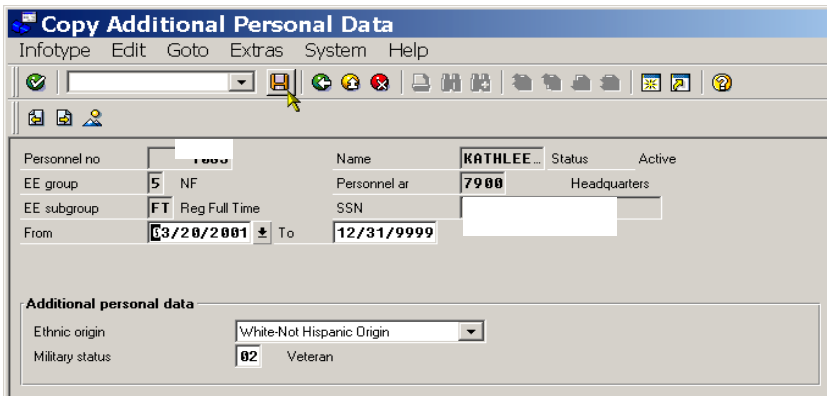
Press the Save icon .

The next infotype is Create Addresses – Unpaid Compensation.



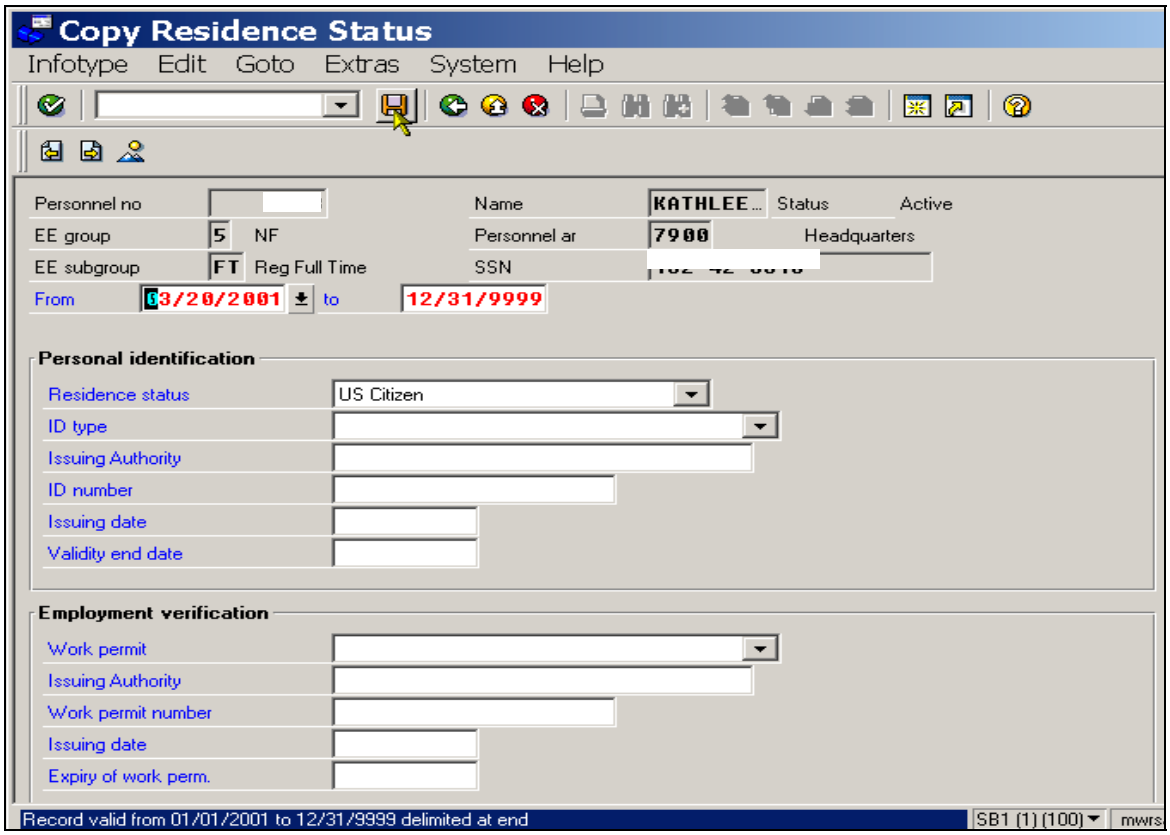
After making entries, press the Enter icon to validate. You will be warned to Save your entries.

Press the Save icon .



Validate entries by selecting , and save this screen.

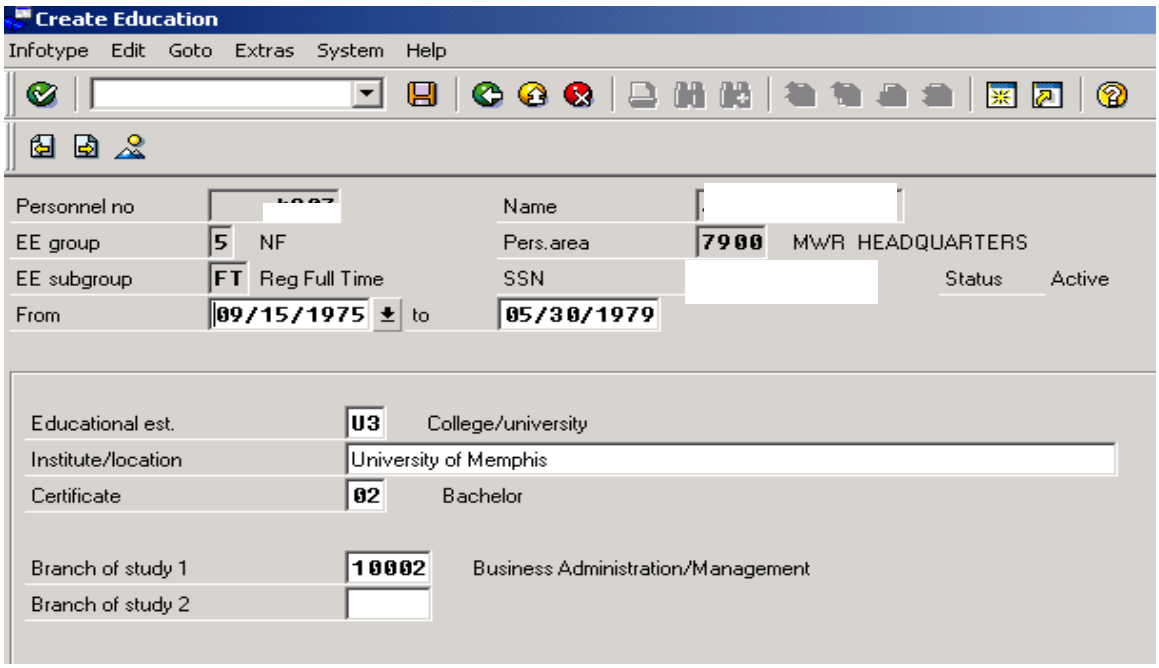
The next screen is Copy Residence Status.



Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

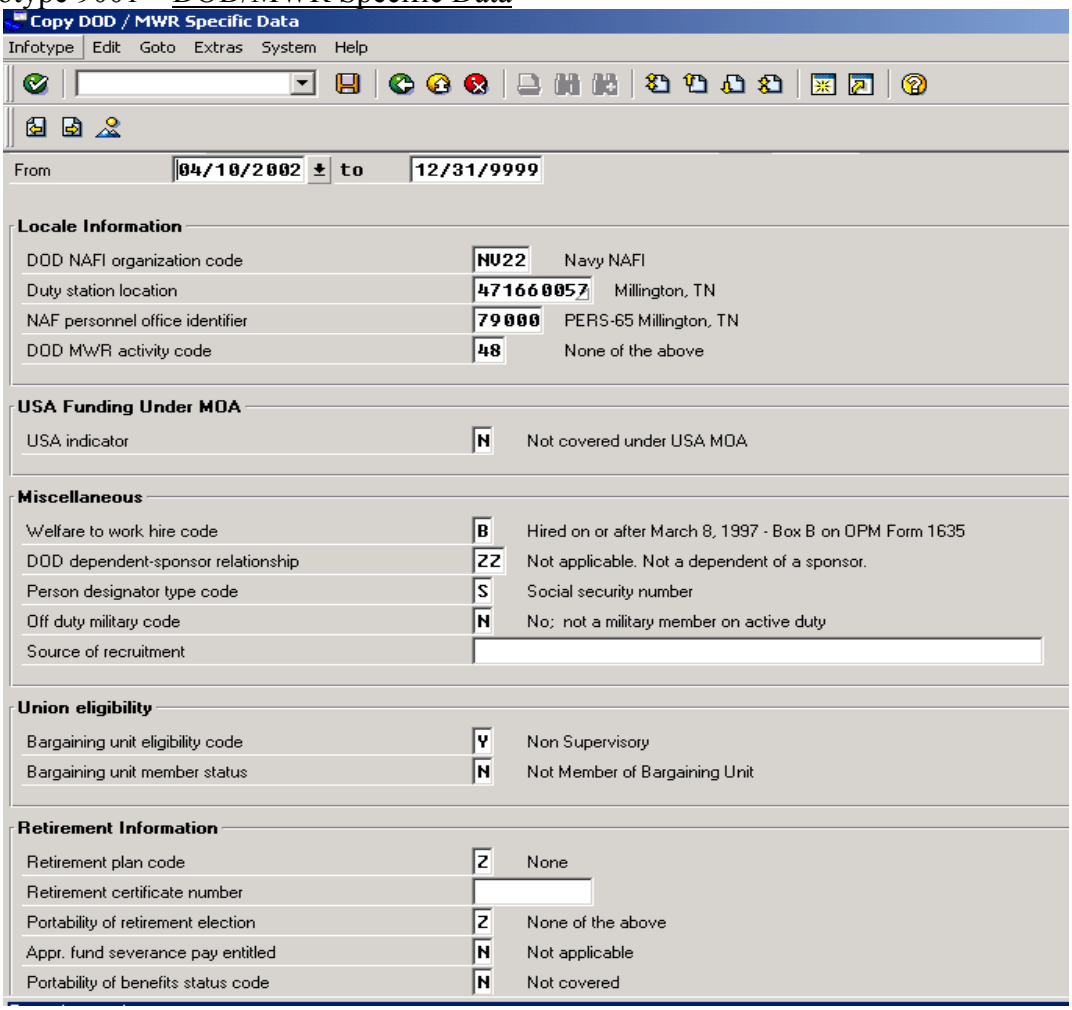
Press the Save icon .

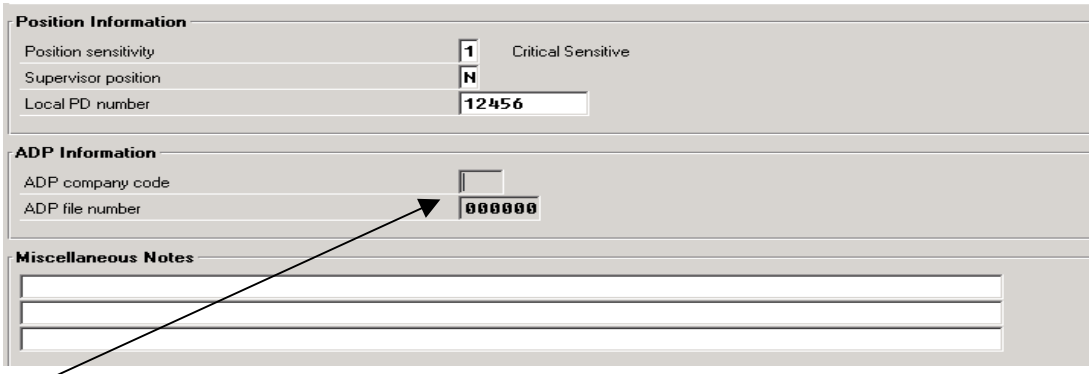
The next screen is Create Education. If no entries are necessary, click the icon. If Education data is available, make entries in all required fields, and save your entries.



The next infotype to appear is the mandated DOD/MWR information type.

Infotype 9001 – DOD/MWR Specific Data

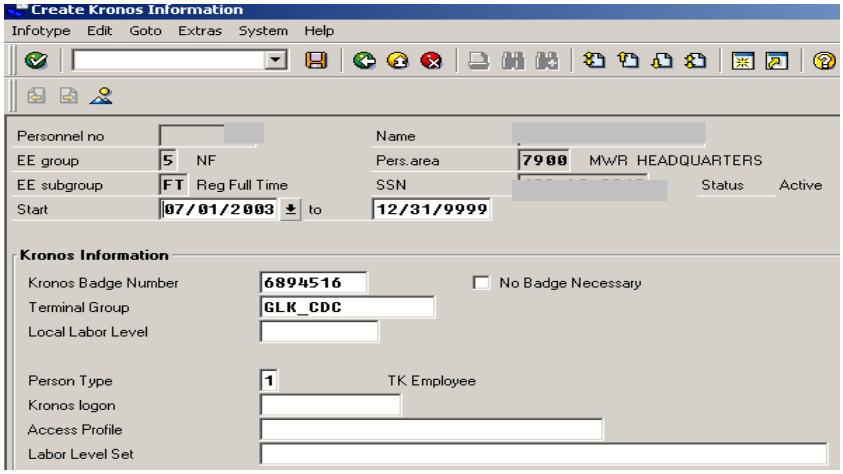




ADP Company code and **ADP file number** must be blanked out. The information will populate overnight after the IDOCs have been processed.

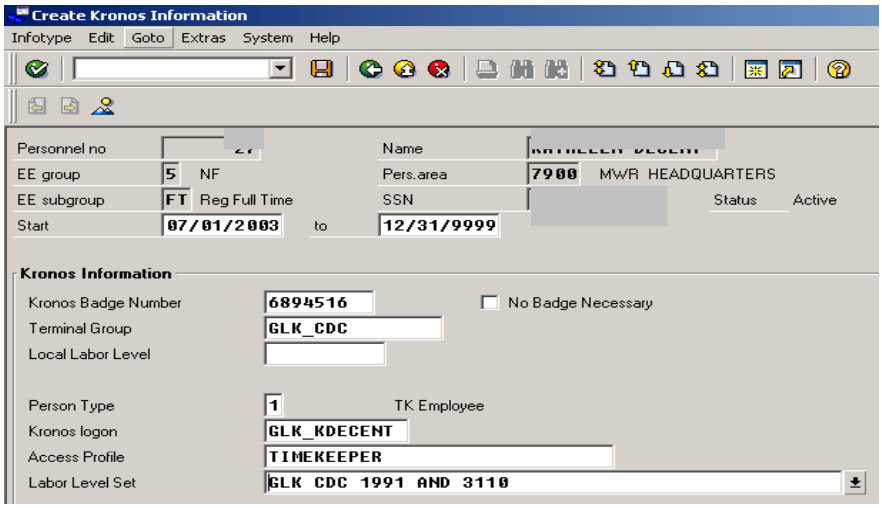
Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

The screen will roll to the next infotype 9005 – *Create Kronos Information*
9005 details will look like this for a Kronos Employee:



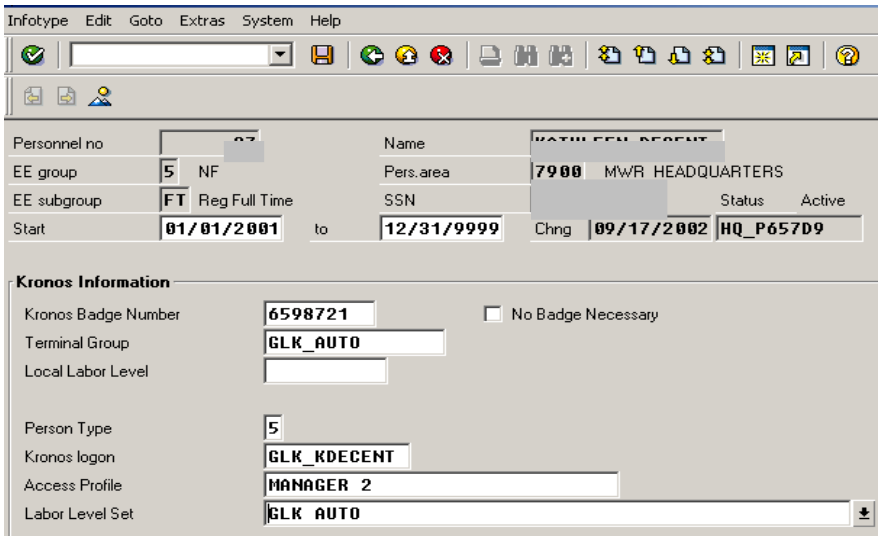
A Kronos Employee punches in and out at a timekeeper terminal. This employee requires a Badge Number and Terminal Group and the Person Type is 1 for TK Employee.

9005 details will look like this for a Timekeeper (TK) Employee:



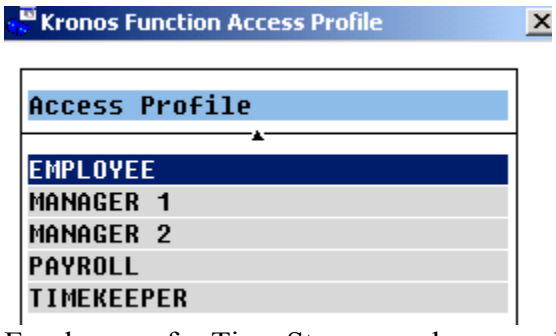
Timekeeper employees edit timecards and schedules, but cannot sign off. A Kronos Timekeeper Employee may punch in and out at a timekeeper terminal, requiring a Badge Number and Terminal Group or they could be Pay From Schedule or Timestamp Employee. A Pay From Schedule or Timestamp Employee would not require a Badge Number or Terminal Group.
The Person Type is 1 for TK Employee. The Kronos Logon is always in all caps and is the three alpha characters for your region followed by an underscore and the first letter of the first name and up to seven letters of the last name. The Access Profile is Timekeeper. The Labor Level Set is only used for managers to tell Kronos which group of employees the manager will administer.

9005 details will look like this for a Manager:



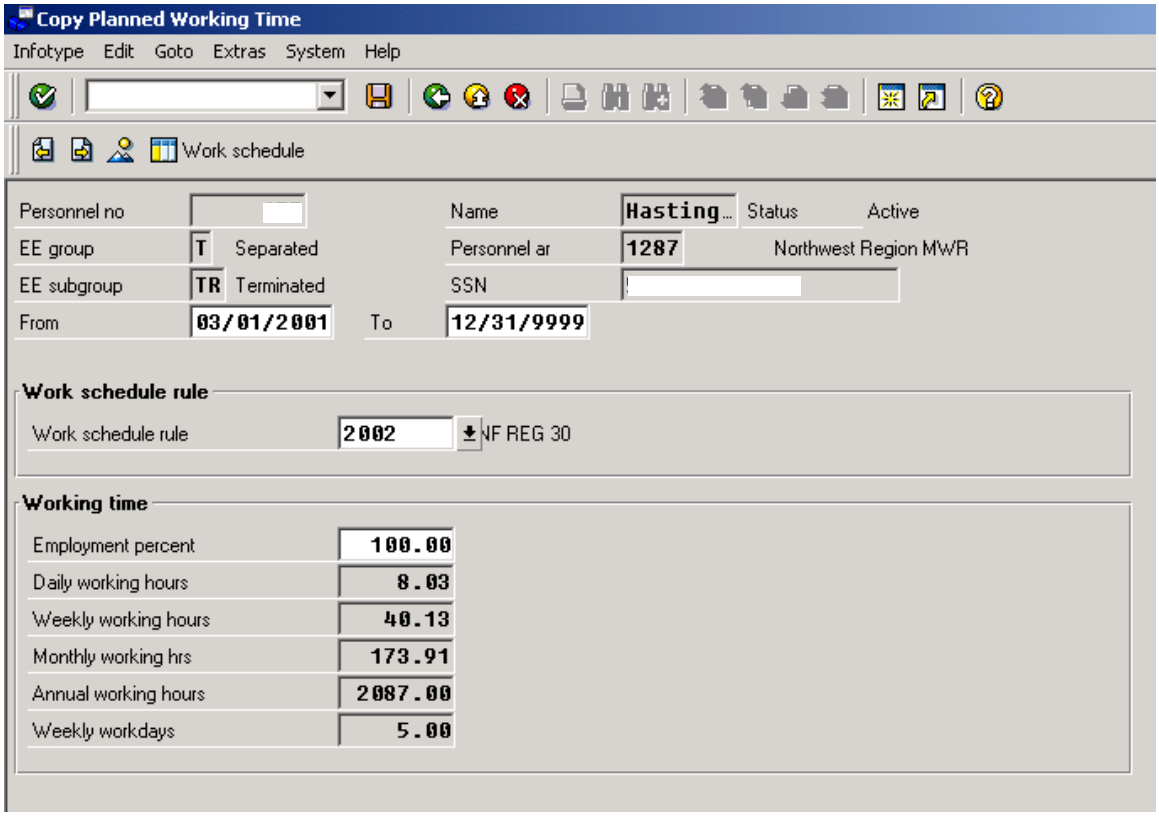
A Kronos Manager may punch in and out at a timekeeper terminal, requiring a Badge Number and Terminal Group or they could be Pay From Schedule or a Timestamp Employee. A Pay From Schedule or Timestamp Employee would not require a Badge Number or Terminal Group.
The Person Type can be 4 for a manager whose hours are recorded via timestamp or 5 for a manager who punches in and out at a timekeeper terminal or is Pay From Schedule.
The Kronos Logon is always in all caps and is the three alpha characters for your region followed by an underscore and the first letter of the first name and up to seven letters of the last name. The Access Profile is Manager 2. The Labor Level Set is only used for managers to tell Kronos which group of employees the manager will administer.

A GS manager who will not be entering time in WorkForce Central, but will manage employees will be a 5 for Person Type and will have an Access Profile of Manager 1, Manager 2, or Timekeeper. See description below.



Employee – for Time Stamp employees only.
Manager 1 – will be able to approve timecards, but cannot sign off.
Manager 2 – will be able to approve and sign off timecards.
Payroll – used for payroll employees.
Timekeeper – will be able to edit timecards, schedules, but cannot sign off. Press the Enter button and Save the transaction.

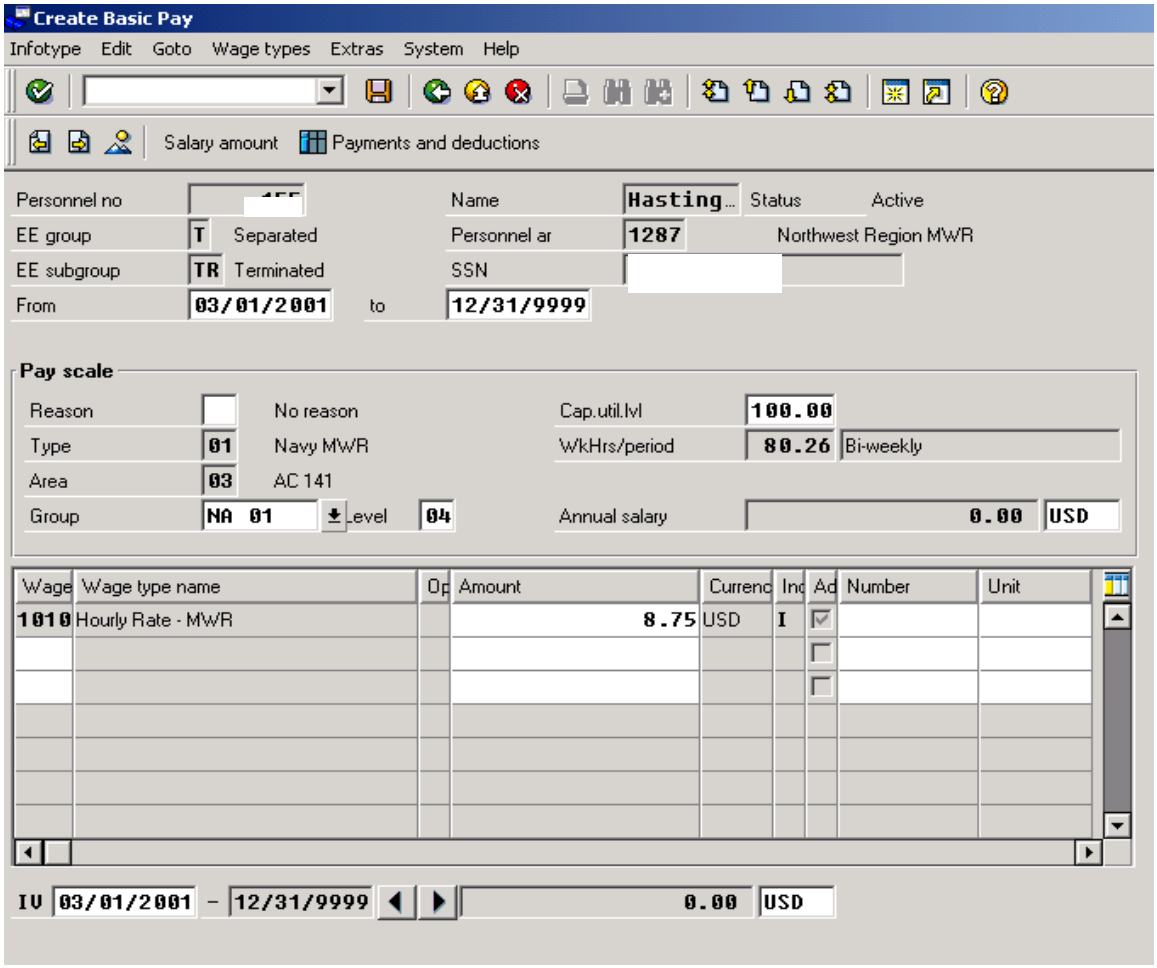
The next infotype in the process 0007 – Copy Planned Working Time appears



The only entry required is the Work Schedule Rule. In the example it was **2002 – NF REG 30.** Select for the dropdown.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

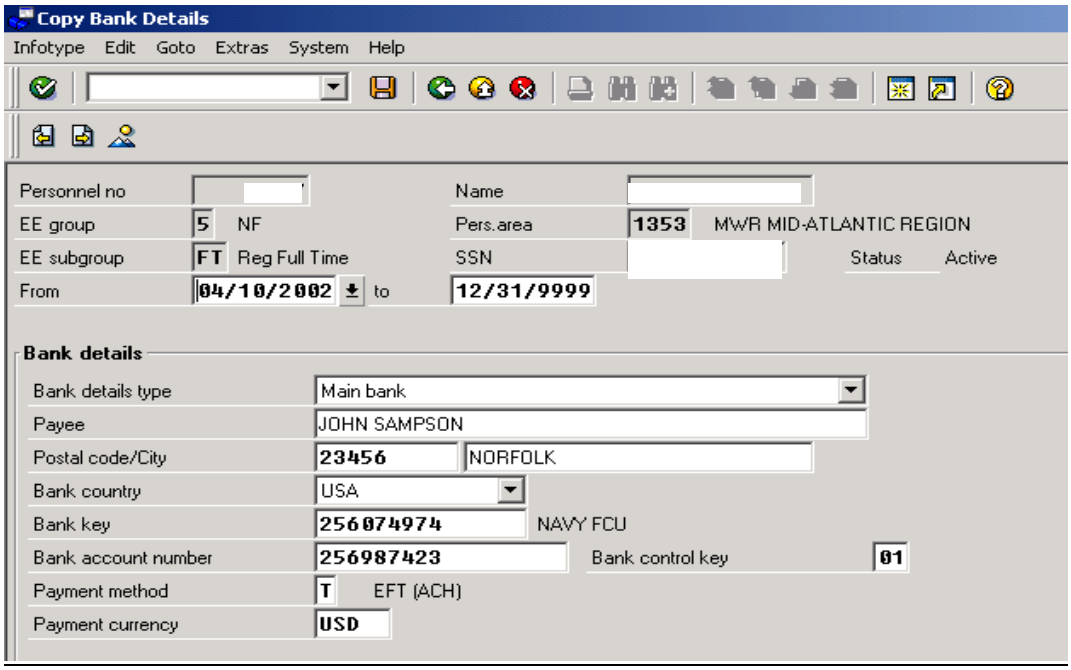


We have filled in the fields required on this infotype 0008 – Create Basic Pay
We entered the group, the level and the hourly rate of pay.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

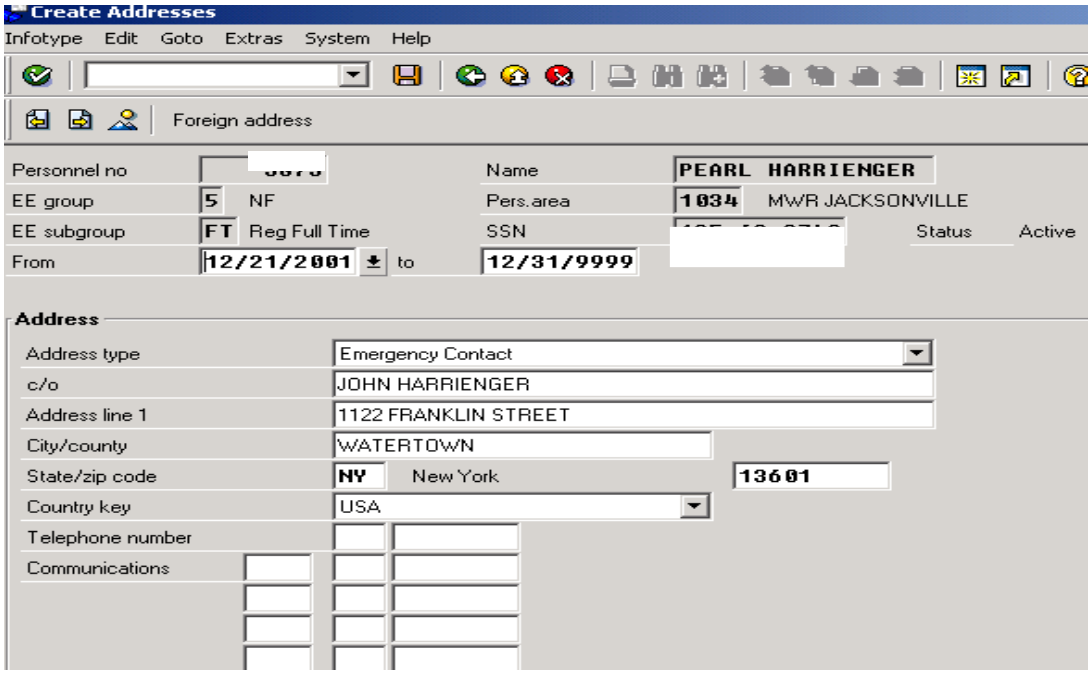
The screen will roll to the next infotype 0009 – Copy Bank Details



Bank details data are used by the automatic employee vendor creation program in accounts payable. Make any changes necessary and save.

Field Name	Description	R/O/C	User Action/Values
Bank Details Type	Type of bank for this Employee	R	Will default to main bank
Payee	Employee's name	R	Will default
Postal code/City	Zip code/City	R	Will default
Bank Country	Bank Country	R	Will default USA
Bank Key	The name of the bank the funds are to be deposited into	R	Enter the employee's bank deposit transit/ABA number from direct deposit sign up form.
Bank Control Key	The type of account	R	Must be 01 Checking or 02 Savings
Bank Account Number	Account number of the account to be deposited into	R	Enter the employee's bank account number.
Payment Method	EFT or a check for the payment?	R	Will default to "T" for direct deposit. Change to "C" only if waiver from MWR HQ is approved.
Payment Currency	Payment Currency	R	Will default to USD

Press the Enter button and Save the transaction. The screen will roll to the next infotype 0006 – Create Addresses, subtype 2 Address, Emergency Contact

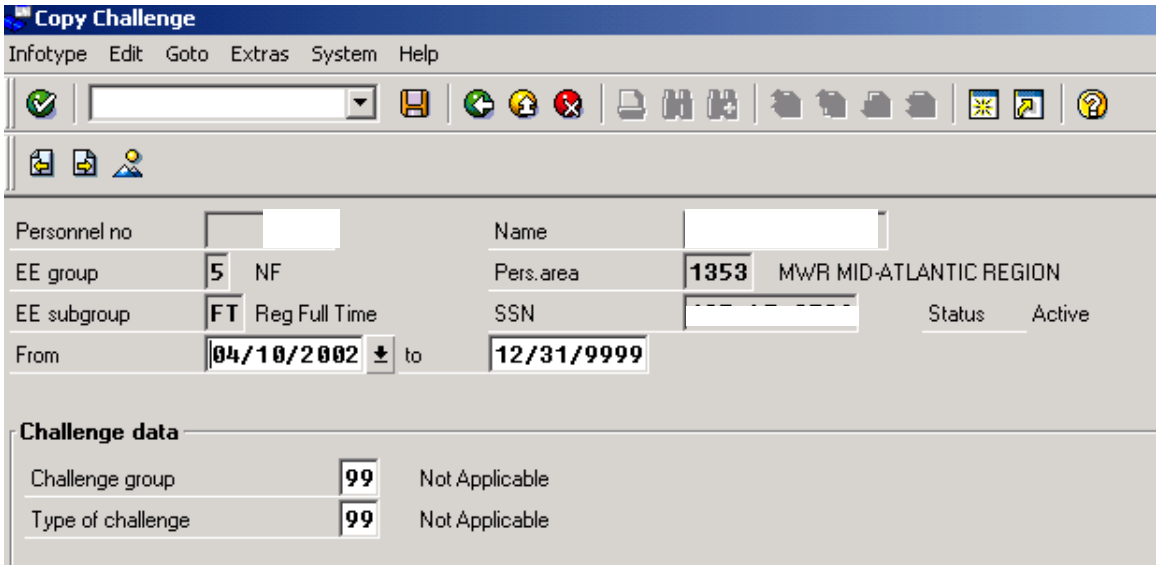


NOTE: According to the United States Postal Service Sorting Facility all names and addresses must be entered into the system using upper case letters (ALL CAPS) and NO punctuation except the hyphen between the first five numbers in a Zip code and the last four.

Field Name	Description	R/O/C	User Action/Values
Address type	Type of Address	R	Defaults Emergency Contact – Who to call
C/O	In care of	R	Enter the emergency contact's first and last name (and relationship if available)
Address	Street name and number	R	Must populate this field, can enter "address unknown"
City/County	City	R	Enter the contact's city. If unknown, use the employee's.
State/Zip Code	State/Zip Code	R	Enter the contact's state and zip. If unknown, use the employee's
Country key	The contact's country key	C	Will default to USA

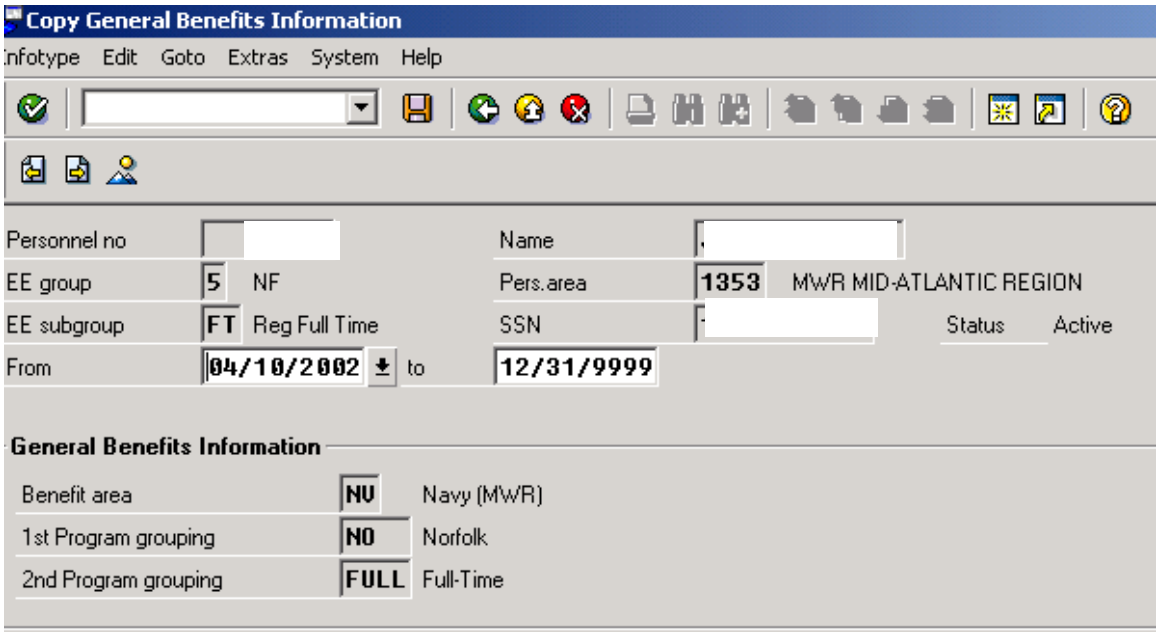
Telephone Number	Telephone	R	Contact's telephone number
Communications	Additional numbers	O	May be used for additional contact phone numbers.

Press the Enter button and Save the transaction. The screen will roll to the next infotype 0004 – Create Challenge.



This screen must be completed! Enter "99" in both fields if challenge not applicable.

The next screen to appear is Copy General Benefits Information.

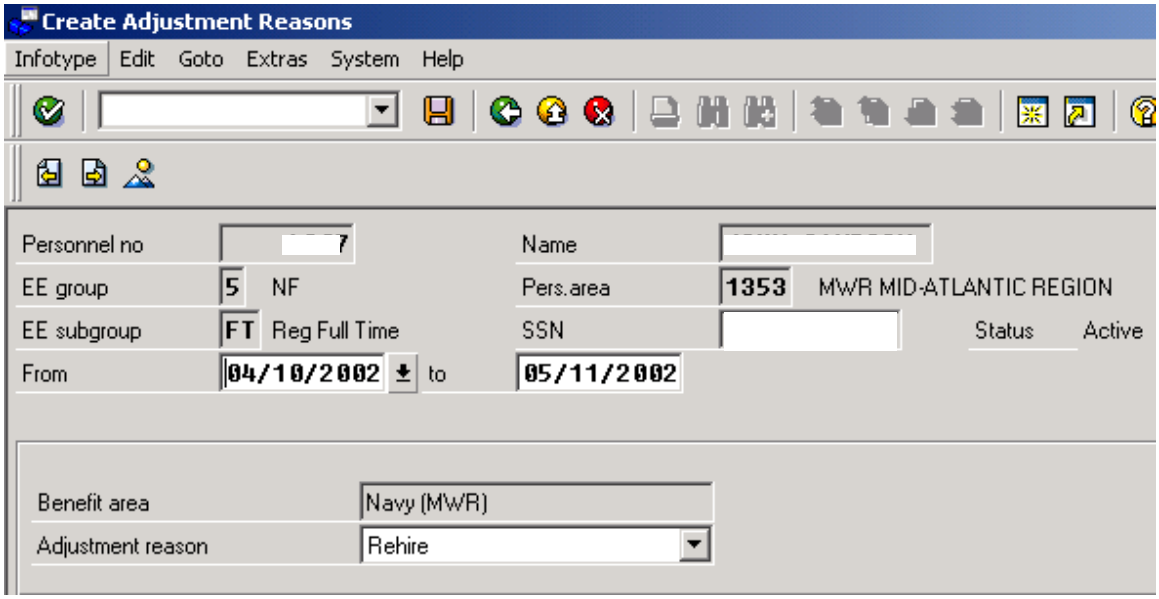


Infotype 0171 – Copy General Benefits Information requires no entry, just validation of the information and saving it.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The final infotype to appear in the rehire process is infotype 0378 – Create Adjustment Reasons. This screen is shown here.



Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The process is complete and this can be verified by using transaction code PA20 to inspect all the infotypes processed during the rehire.

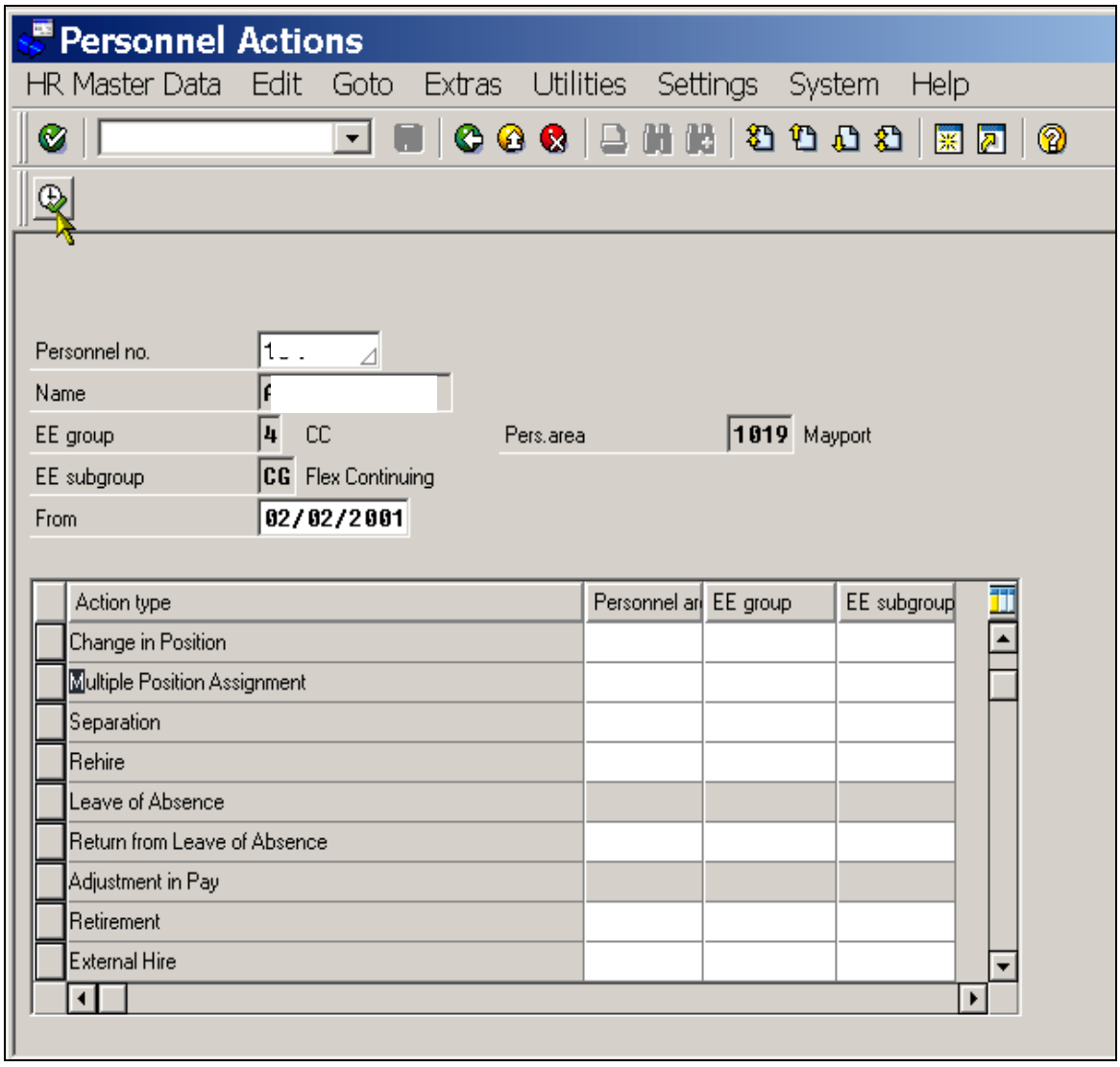
Print a Personnel Action Report, and continue processing rehire with Benefit Enrollment.

Process a Multiple Position Assignment

This procedure will cover the necessary steps to process an employee's record that, because of circumstances, has been assigned to two positions. This is not a common situation but it does occasionally occur at smaller operations where people are "double-hatted."

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

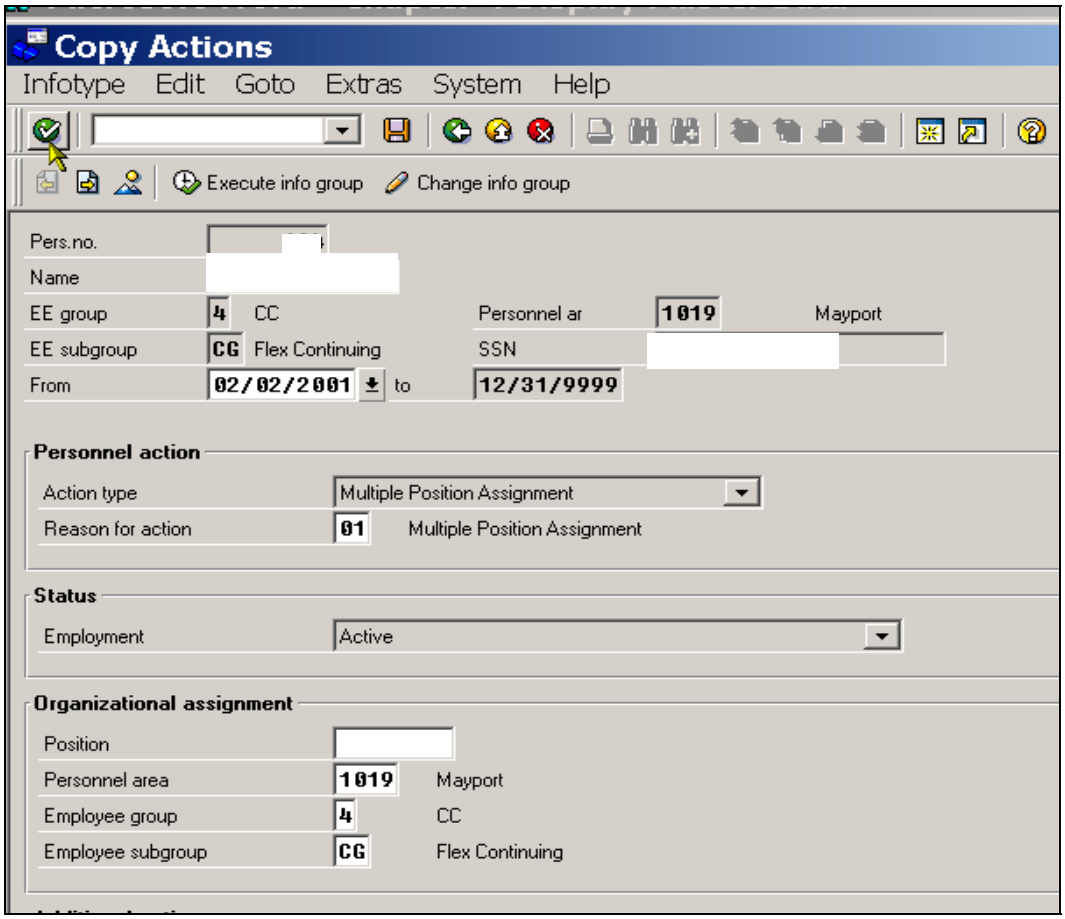
Transaction Code: **PA40**



Field Name	Description	R/O/C	User Action/Values
Personnel Number	The individual Personnel Number assigned to each employee	R	Enter the Personnel number, if known, or use the dropdown menu to select.
From	The FROM date	R	Enter the beginning date of the multiple position assignment.
Action Type	The types of action that can be performed	R	Select the Multiple Position action line to highlight.

Select the Execute icon

The screen will roll to infotype 0000 – Copy Actions

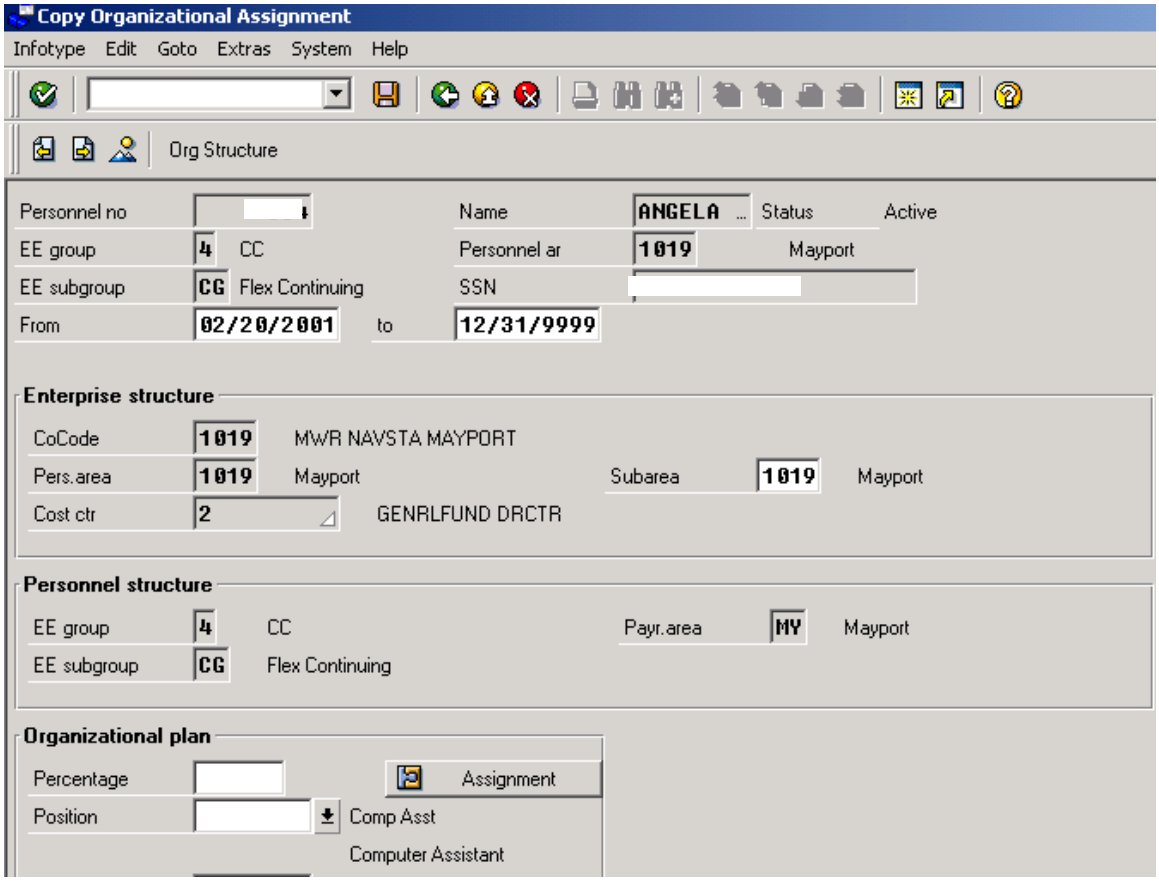


Field Name	Description	R/O/C	User Action/Values
Action type	Multiple Position	R	Will default from previous screen
Reason for action	The reason for the action being performed	R	Select the appropriate reason code for the Multiple Position Action using the dropdown menu.
Employment	User defined	R	Will default in. Cannot be changed
Position Number	User defined	R	**Blank out the position number in this field.**
Personnel Area	The assigned area of the organization of the position	R	Will default in and will represent the MWR location to which the original position has been assigned.
Employee Group	The group of employees that the employee will be assigned to.	R	Will default from the original position and represents the employment category, i.e. NF, NA, CC, etc.
Employee Subgroup	The assigned subgroup of the employee.	R	Leave the information as defaulted in. **This is for flexible employees. For working retirees change to RW.**

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon to save the transaction and to open the next infotype record.

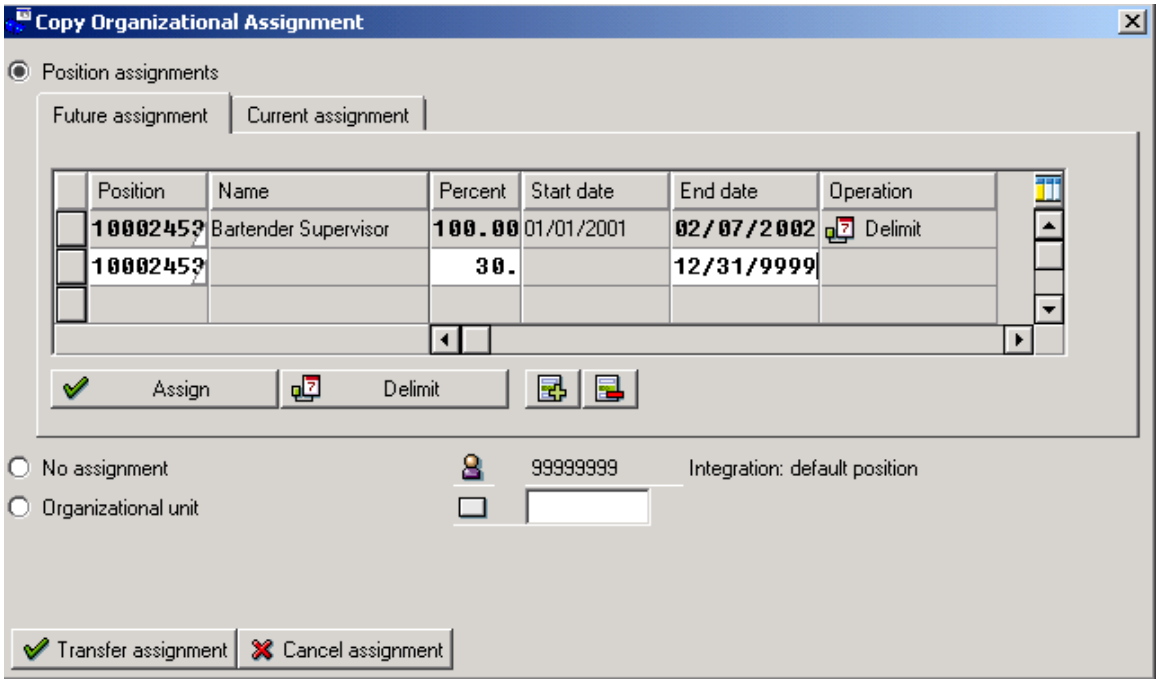
Infotype 0001 – Copy Organizational Assignment will show.



Field Name	Description	R/O/C	User Action/Values
Co Code	Company Code	R	Will default based on position
Pers Area	Personnel Area	R	Default in based on the entries made to the Infotype 0000 - Actions.
Cost Ctr	Cost Center	R	Will default blank and will be populated after the multiple positions are created.
Subarea	Personnel area	R	Default in based on the entries made to the Infotype 0000 - Actions.
EE Group	Employee Group	R	Default in based on the original entries made to the Infotype 0000 - Actions.
EE Subgroup	Employee Subgroup	R	Default in based on the original entries made to the Infotype 0000 - Actions.
Payr Area	Payroll Area	R	This field will default in.

Percentage	The percentage that the employee is assigned to the position number	R	This field will default to 100% **It must be blanked out!**
Assignment button	The percentage for each position	R	Allows for entering the % that the employee will be assigned to each position.

Click on the Assignment button

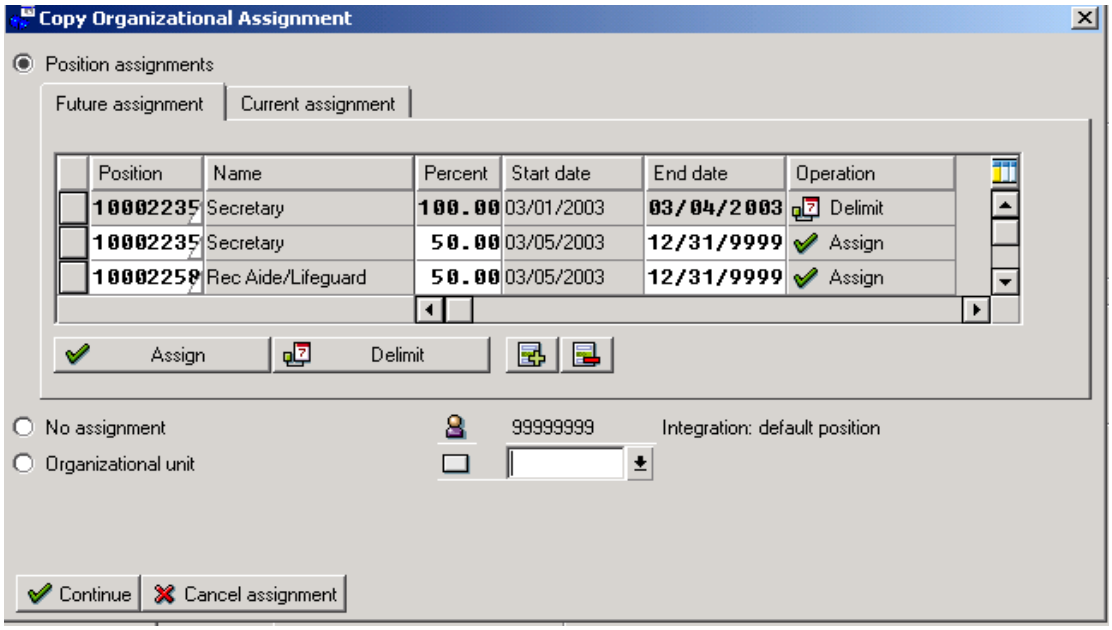


The window as shown above is one example of the Copy Organizational Assignment Action screen.

NOTE: The first line in the window will show the current assignment and will be delimited.

The first line with the current position will be grayed out. We now must correct the assignment to reflect the multiple positions. Re-enter position number, enter 30.00 in the percent field and the end date of 12/31/9999.

For the multiple position, we need to add another line in the window to enter this information.



Click the Insert Line button (the page with the plus sign on it) to add another line to the window. Enter position number **10003654** in the first field. Enter **70.00** in the percent field. Change the End date to **12/31/9999**.

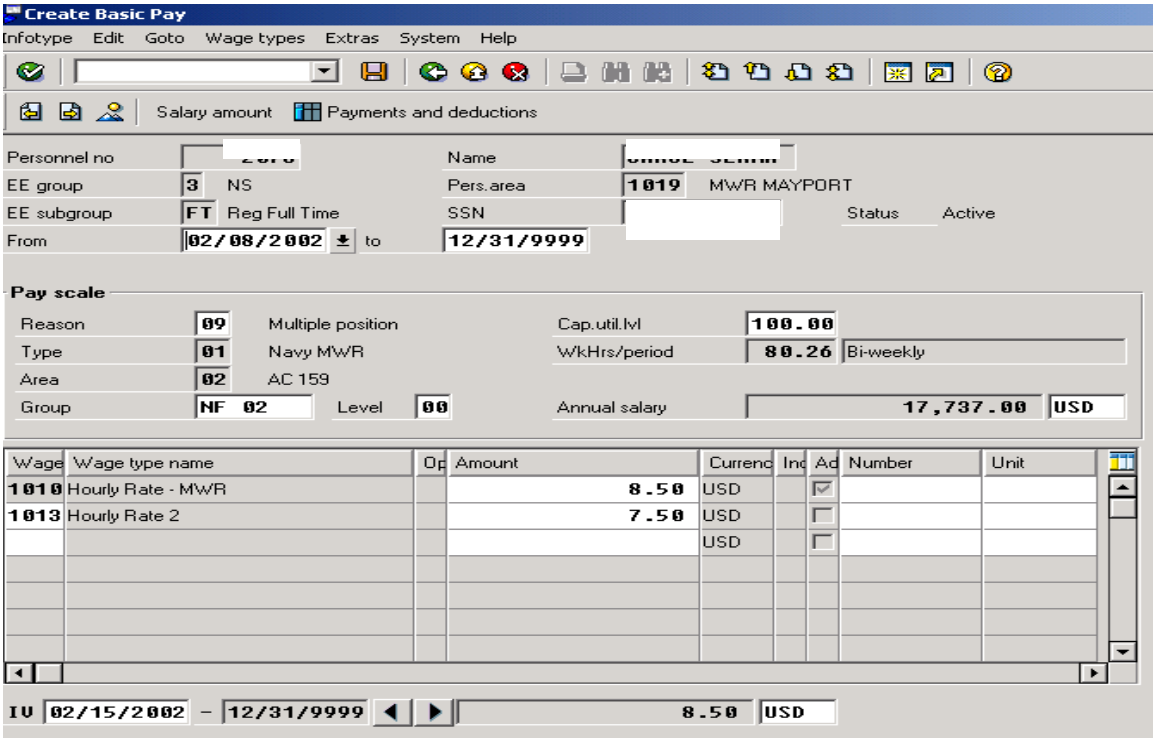
Click the Assign button Assign. This puts the green check mark on the third row in the Operation column.

Click on the Continue Icon Continue. You will receive the warning shown, click the green check mark and you will be taken back to the Copy Organizational Assignment infotype.

You will be prompted to create a vacancy for the original position (if there was one).

Save the transaction by clicking the SAVE icon. Notice that the Copy Organizational Assignment screen shows only one of the multiple positions.

The system will now show the 0008 – Create Basic Pay infotype.



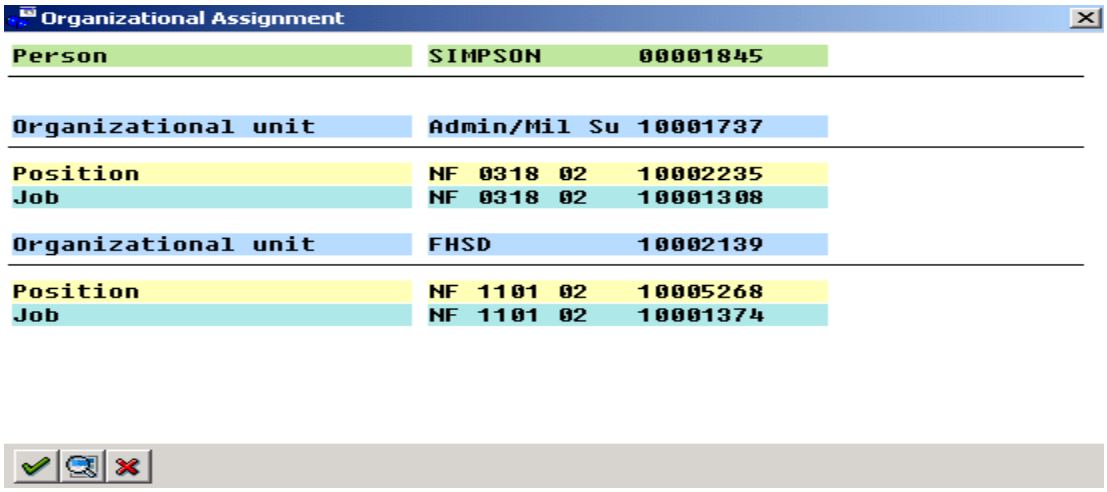
We have entered the grade of the multiple positions and the Hourly rates. You will need to enter a reason code -choose one from the drop down menu for multiple position group. **Always use the drop down arrow to find correct selection and double click on it to enter.**

Field Name	Description	R/O/C	User Action/Values
Reason Code	2 digit code	R	**Use drop down arrow to select reason code for multiple position**
Group	Personnel group	R	**Must be original position group**
Wage type	Rate code	R	Enter 1013 for multiple position type
Amount	Hourly pay rate	R	For the first position enter the hourly rate(s), for NF's and CC's – all others will populate when user hits enter. Can override for save pay. The second position must also have an hourly rate. Enter the hourly rate.

Press the Enter button. Press Enter again to validate the entries.

Press the Save icon to save the transaction. The employee is now created with Multiple Positions in the system.

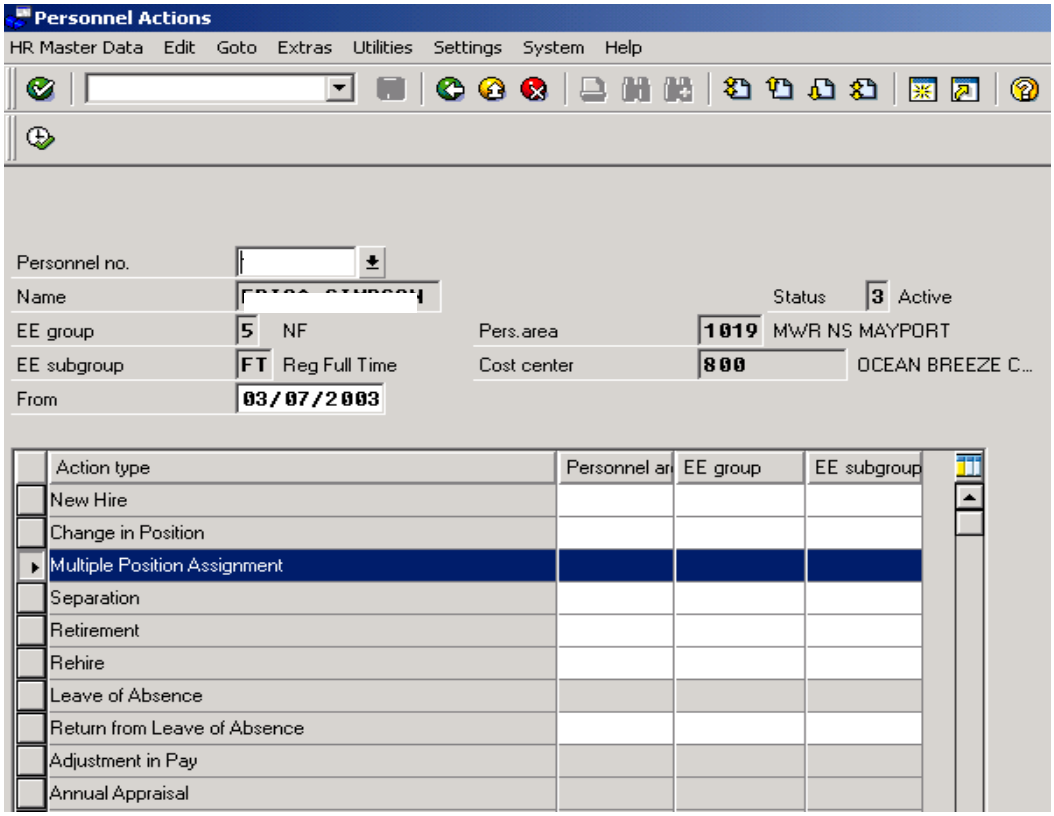
NOTE: To view multiple positions, use PA20 to display HR Master Data, enter personnel number, select Organizational Assignment, and the **icon. Both positions will be displayed.**



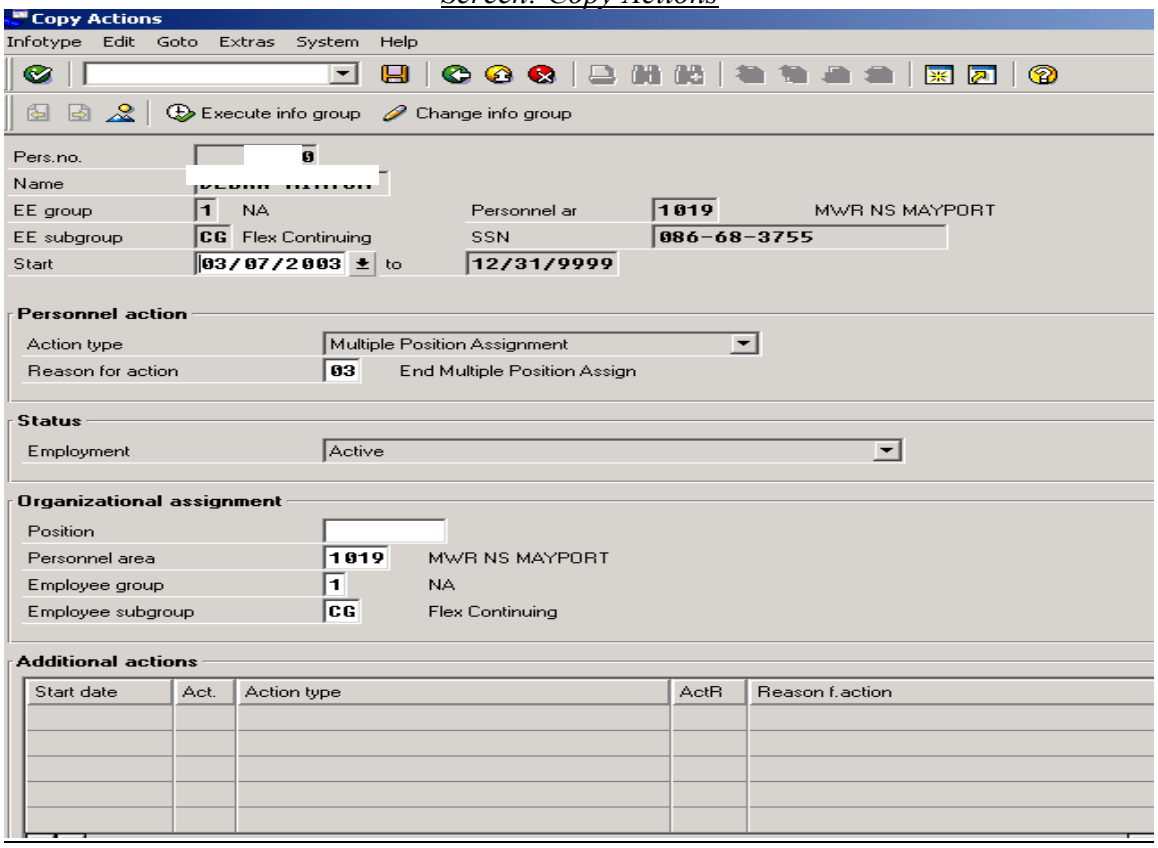
End of Multiple Position Assignment

Menu Path: HUMAN **RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**
Transaction code: PA40

This procedure describes the steps necessary to process the end of a multiple position assignment through the SAP Human Resources system. We have highlighted the Multiple Position Assignment line in the Action type section on the Personnel Actions screen and click the Execute icon .



Screen: Copy Actions

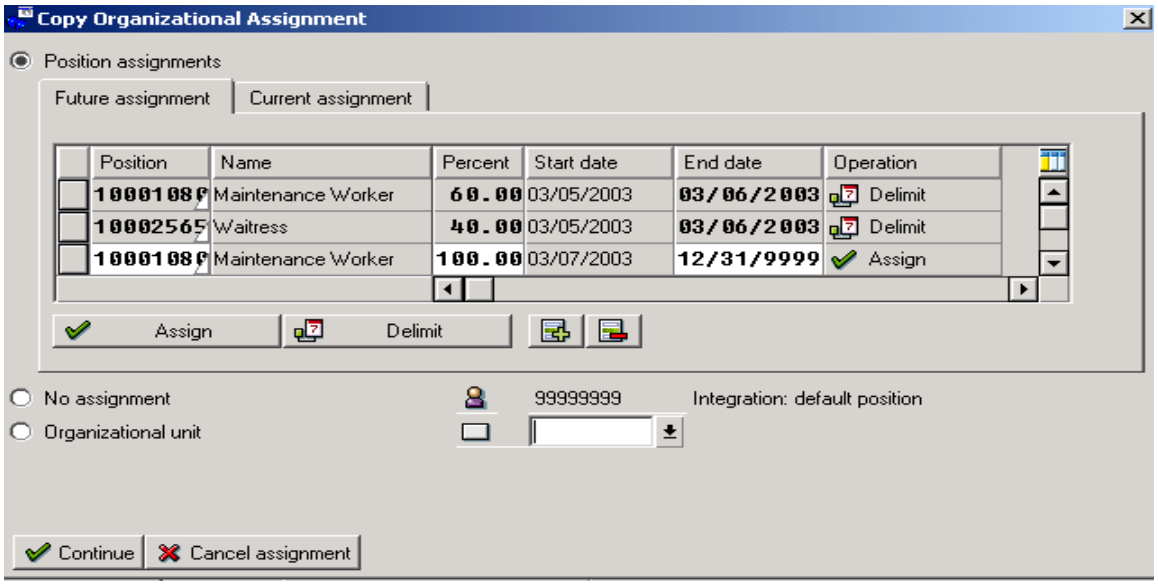


Field Name	Description	R/O/C	User Action/Values/Comments
Reason for Action	The reason the action is being performed.	R	Select 03-End of Multiple Position Assignment.
Position	Position number	R	This will default with the position number, **BLANK IT OUT.**

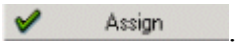
Click on the assignment button

.

The following pop up box will appear.



Both of the multiple positions have been delimited.

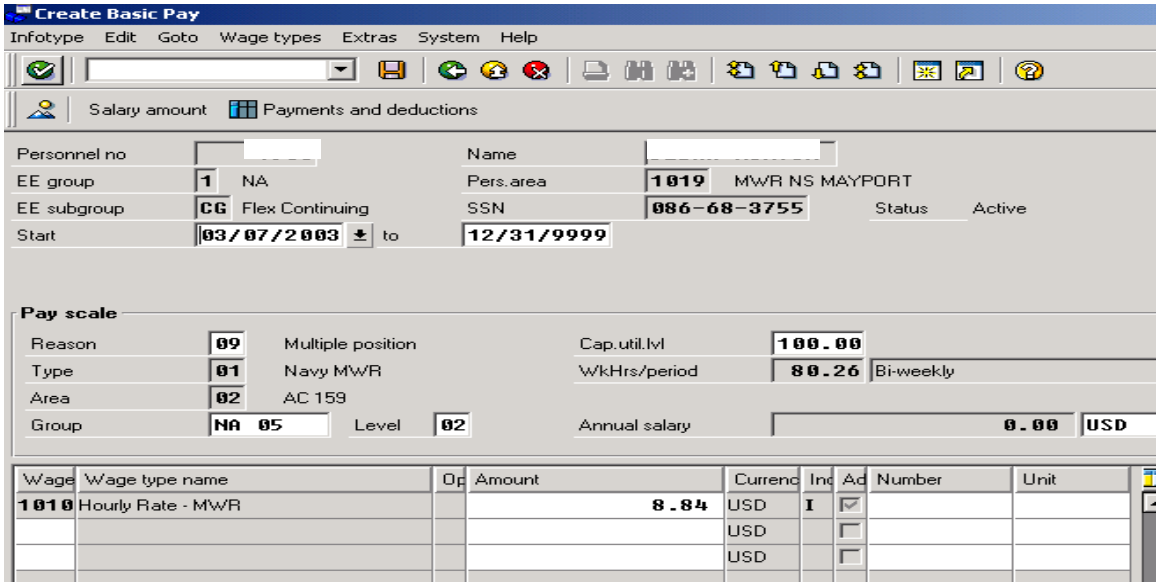
- Enter the position number for the new position.
- Enter 100.00 in the Percent field.
- Enter 12/31/9999 in the End Date field.
- Click on the Assign icon 

. This will put a green check next to the assign button.
- Click on continue

.

You will be taken back to the Copy Organizational Assignment screen. Save the transaction by clicking on the save icon .

Infotype 0008- Create Basic Pay will now come up.



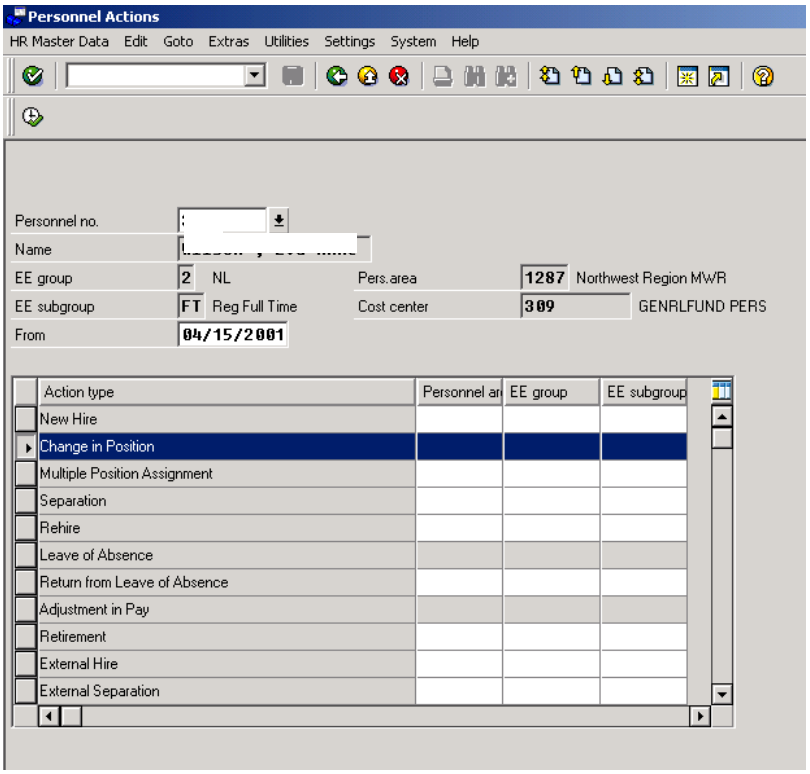
Enter the Reason for action. Select the group and level from the dropdown. Hit enter to populate the hourly rate. Save.

Process a Change in Position

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**
Transaction code: **PA40**

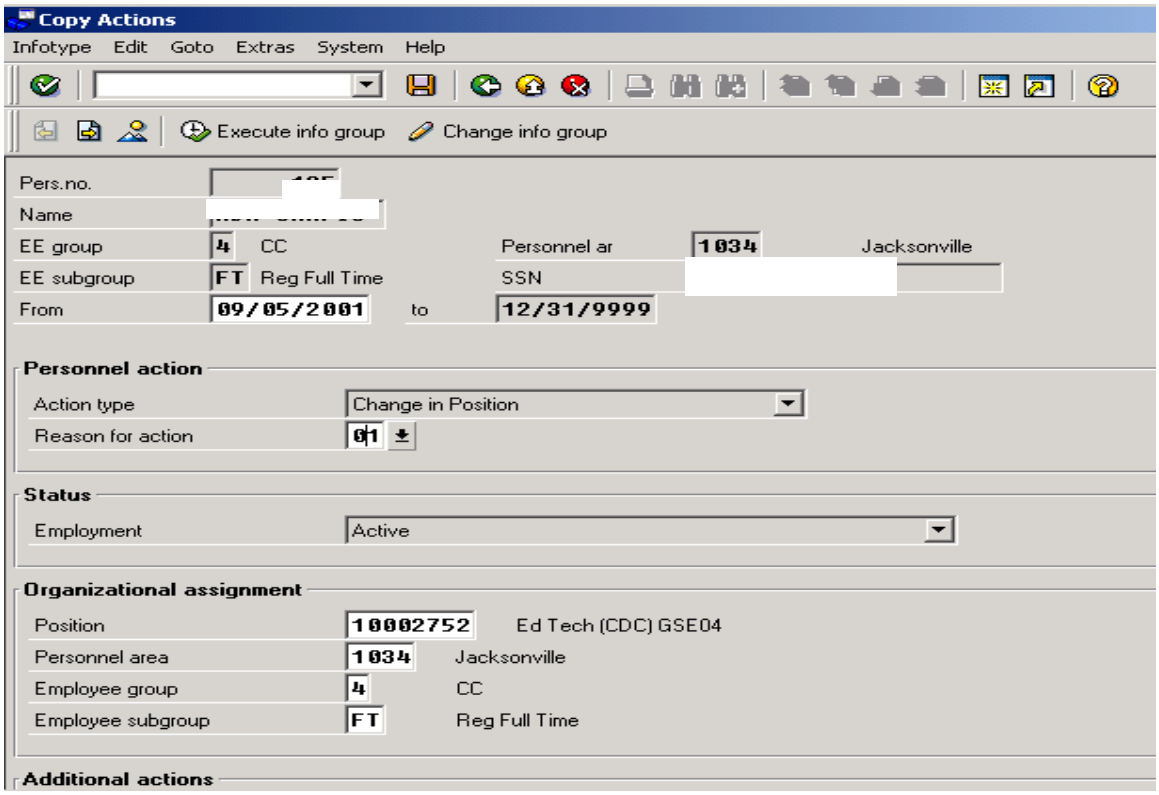
Process a Change in Position

This procedure describes the steps necessary to process a change in a position through the SAP Human Resources system. We have highlighted the Change in Position line in the Action type section on the Personnel Actions screen and we now click the Execute icon.



Field Name	Description	R/O/C	User Action/Values/Comments
Personnel number	The individual Personnel Number assigned to each employee	R	Enter the Personnel Number, if known, or use the dropdown menu to select.
From	The From Date	R	Enter the beginning date of the Change in Position.
Action Type	The types of action that can be performed	R	Select the Change in Position action line to highlight.

Screen: Copy Actions



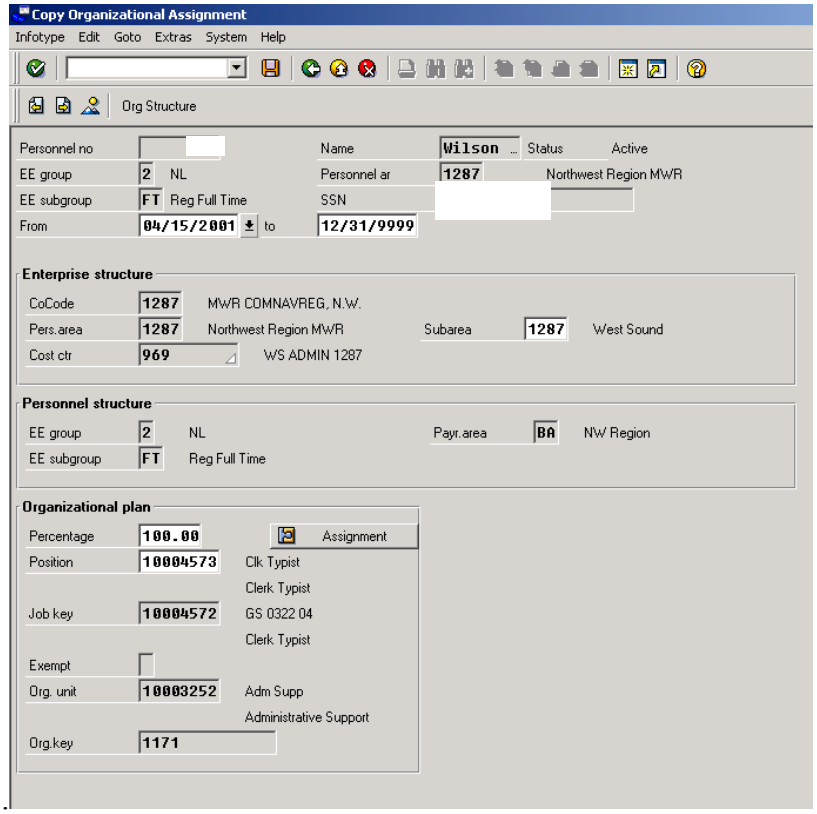
Field Name	Description	R/O/C	User Action/Values/Comments
Action type	Action type	R	Will default "**Change in Position**"
Reason for Action	The reason for the action	R	**Enter the reason for the action using the drop down arrow.**
Employment	In the Status section	R	Will default to Active and it is not available for editing
Position	The current position number	R	Enter the new position number either directly, if known or use the drop down arrow.
Personnel Area	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Group	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Subgroup	Will default from the previous position. **Blank it Out!**	R	Blank out the information from the previous position .Use the drop down arrow to select the correct employee subgroup.

NOTE: After striking the Enter key or clicking the green check mark, you will receive a message stating **"W: Previous record will be delimited "**, i.e., the end date of the last action will now be populated with the "From date" of the new action. This message appears on each infotype.

Press the Enter key or click the green checkmark icon to validate the record and then save it by clicking the Save icon.

The system will now roll to Copy Organizational Assignment

Infotype 0001 – Copy Organizational Assignment:

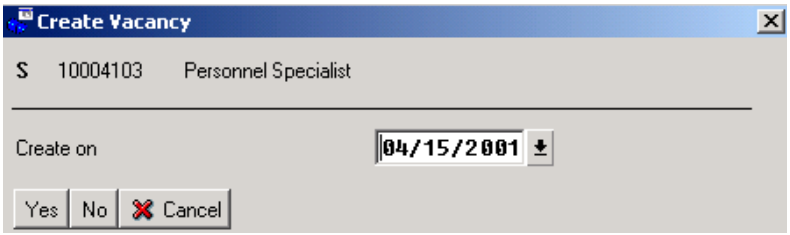


No Entry is required for this infotype.

Press the Enter button or the green checkmark to validate the entries. Save the Record.

"W: Previous record will be delimited", (i.e., the end date of the last action will now be populated with the From date of the new action).

During the normal flow of this process, a pop-up window will appear to create a vacancy for the employee's previous position. Click on the "**Yes"** button on this window. **The date must be changed to the date of the action.** Today's date will default in, so if the date of action is different from today's date, you must change it.



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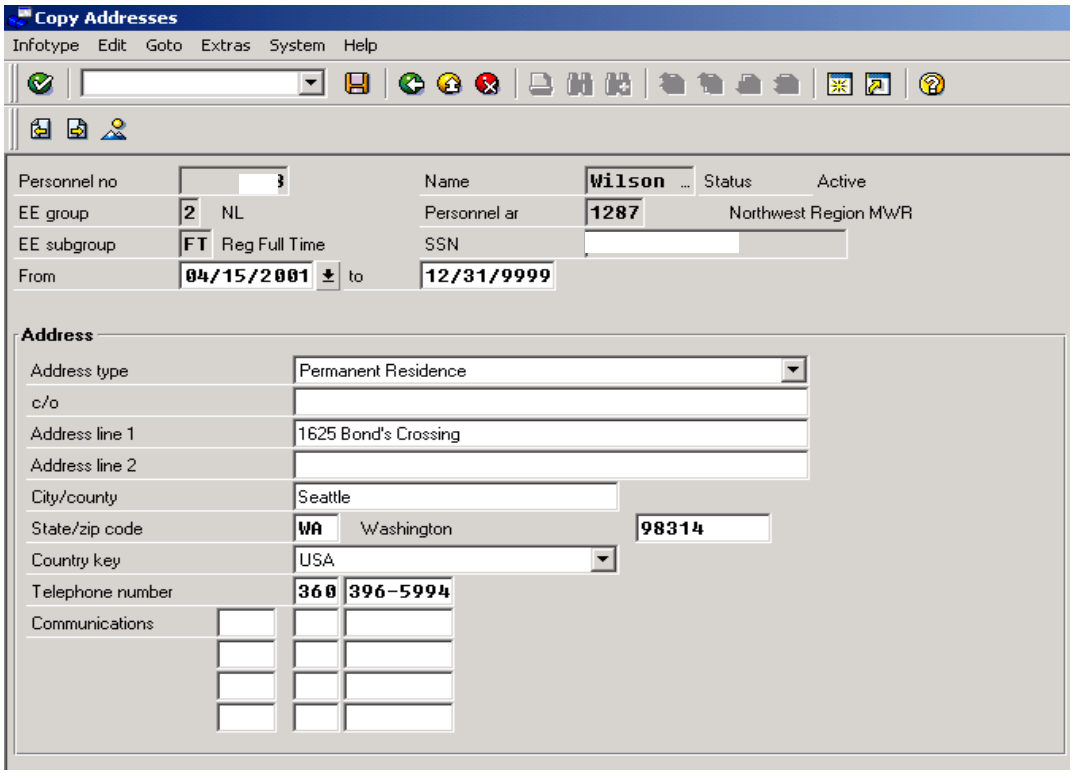
Infotype 0006- Copy Addresses



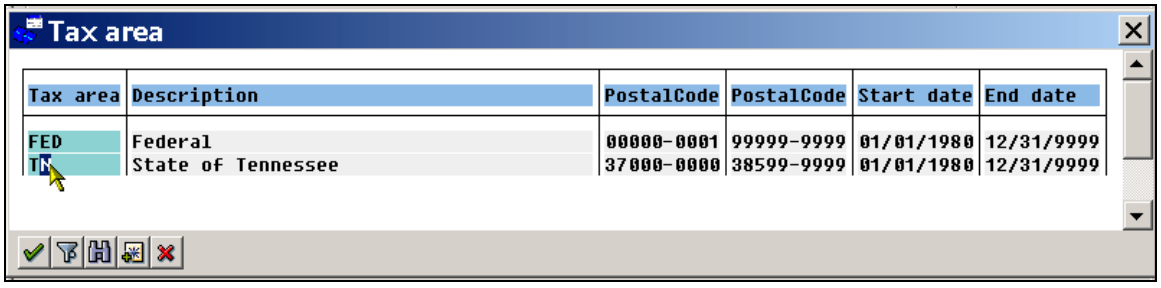
NOTE: If the address does not change due to the position change action, you can right arrow past the screen and not create a new one. If you right arrow through this screen "copy withholding info W4/W5 will come up. If nothing has changed you can also right arrow past the screen. If the address changes, please correct address and save the record.

Press the Enter key or click the green checkmark icon to validate your entries. Save this record.

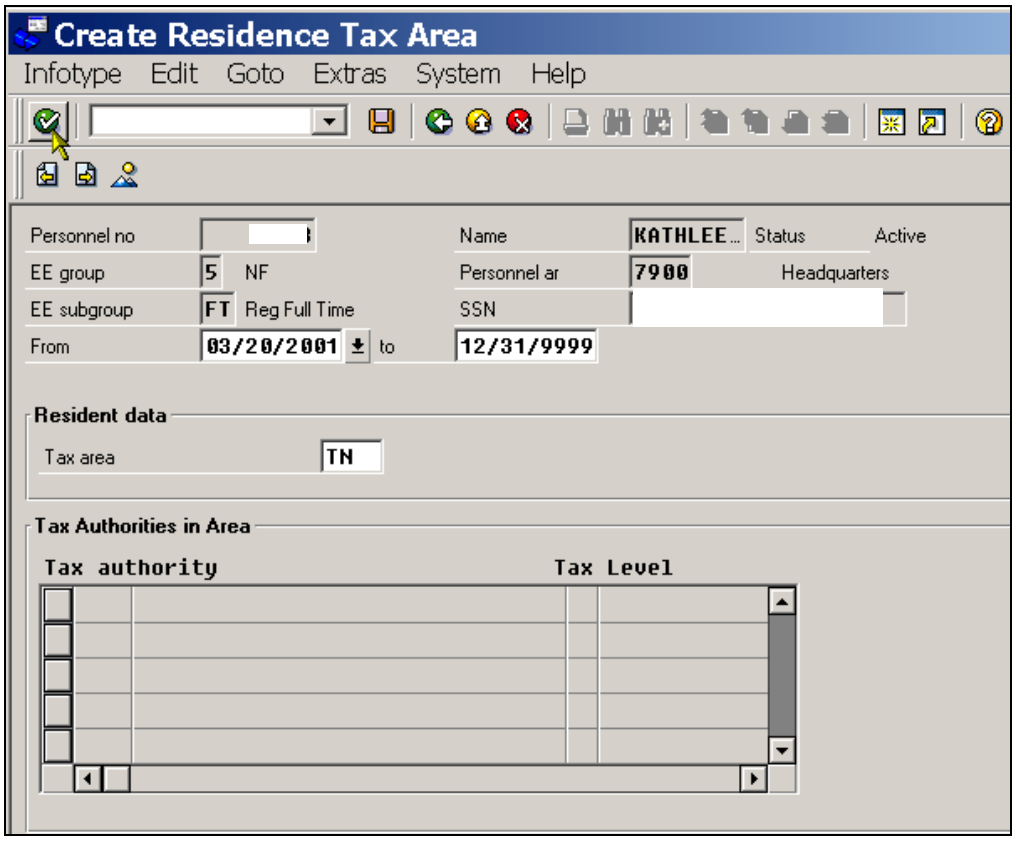
The next infotype is 0210-Withholding info W4/W5 US.

Enter the correct information and press the Enter icon and save.

The next screen to appear is the Tax Area.
Always select the state of residence on this pop up window.

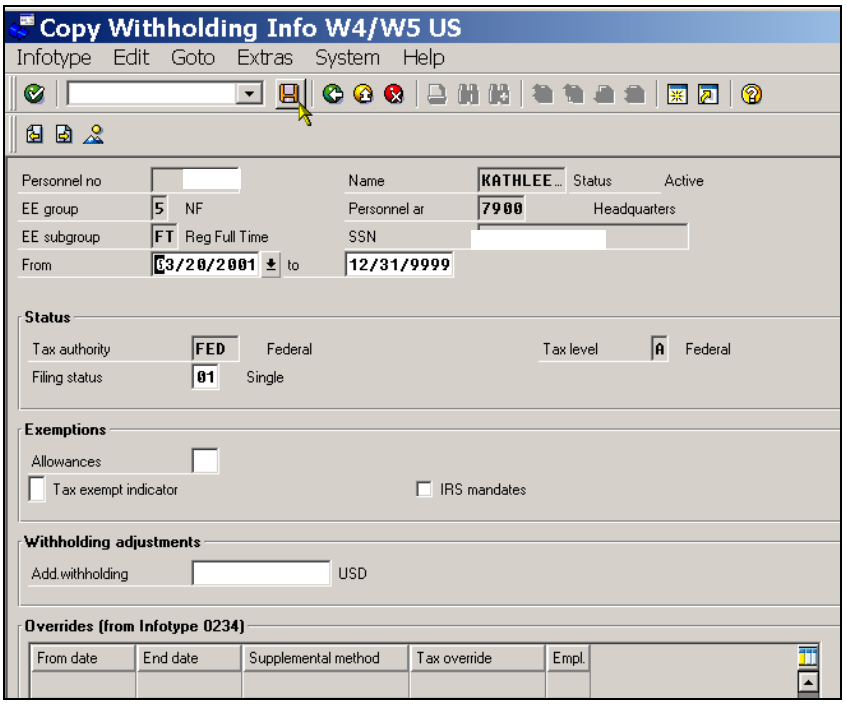


Double click on state name or click once, then select the green check . This populates the tax area field on the next screen, Create Residence Tax Area.



Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .



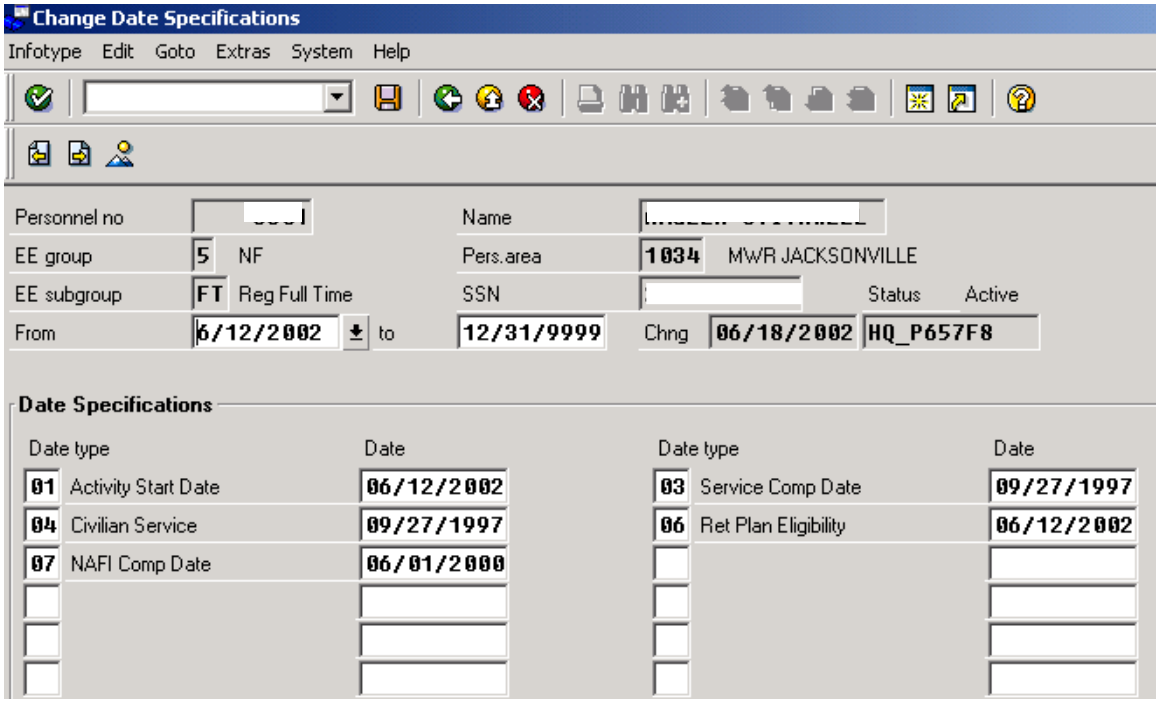
If the withholding information is changing during the change of position you must make the changes on infotype 0210 – Withholding Info W4/W5 US. In this case it is for the Federal Withholding as indicated on the screen.

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to Save your entries.

Press the Save icon .

The next infotype to roll will be Date Specifications.

Infotype 0041 – Date Specifications now appears:



Update any fields necessary.

Date type 01 ***Activity Start Date***, which is the first date of employment at the current activity. This date populates from the new hire action. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.

Date type 04 ***Civilian Service Date,*** which is the Comp date minus the active duty military time. In most cases, this will be the same as the Original hire date.

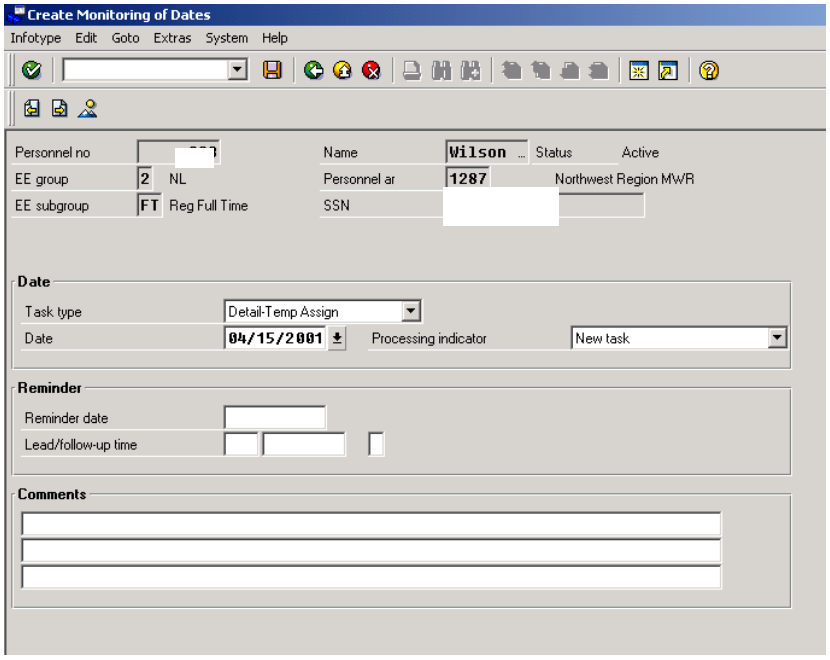
Date type 03 ***Service Computation Date***, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.

Date type 06 ***Ret Plan Eligibility*** is used for benefit retirement plan eligibility. This date will populate from the new hire action and will be one year from date of hire. This date will require updating when an employee changes from a Flex position to a Regular Full Time position.

Date type 07 ***NAFI Computation Date***, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable Regular NAFI service and subtracting that total from the employee's most recent appointment.

If there are any changes to the information shown on this infotype, make the changes, press the Enter key, or click the green checkmark icon to validate the record and then Save it. You will now go to Create Monitoring of Dates.

Infotype 0019 – Create Monitoring of Dates.

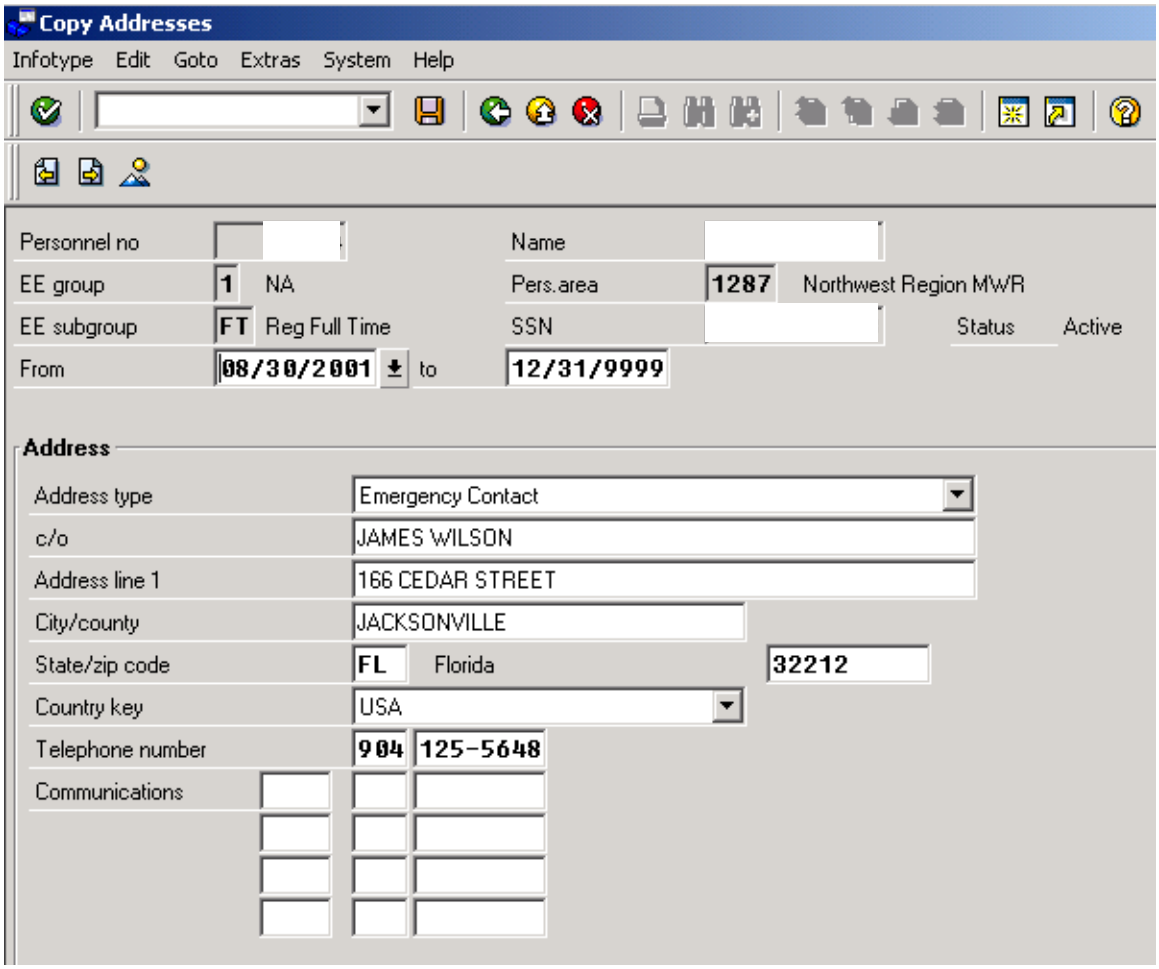


The fields in this infotype are self-explanatory and can be filled in directly or by using the drop down arrows to aid in the selection. In our example, the task type has been filled by using the drop down arrow and selecting "**Detail – Temp Assign"**. We have also entered the date the action becomes effective, and entered the processing indicator "**New task"**. We could also have used the Comments section to write in any free text remarks needed.

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

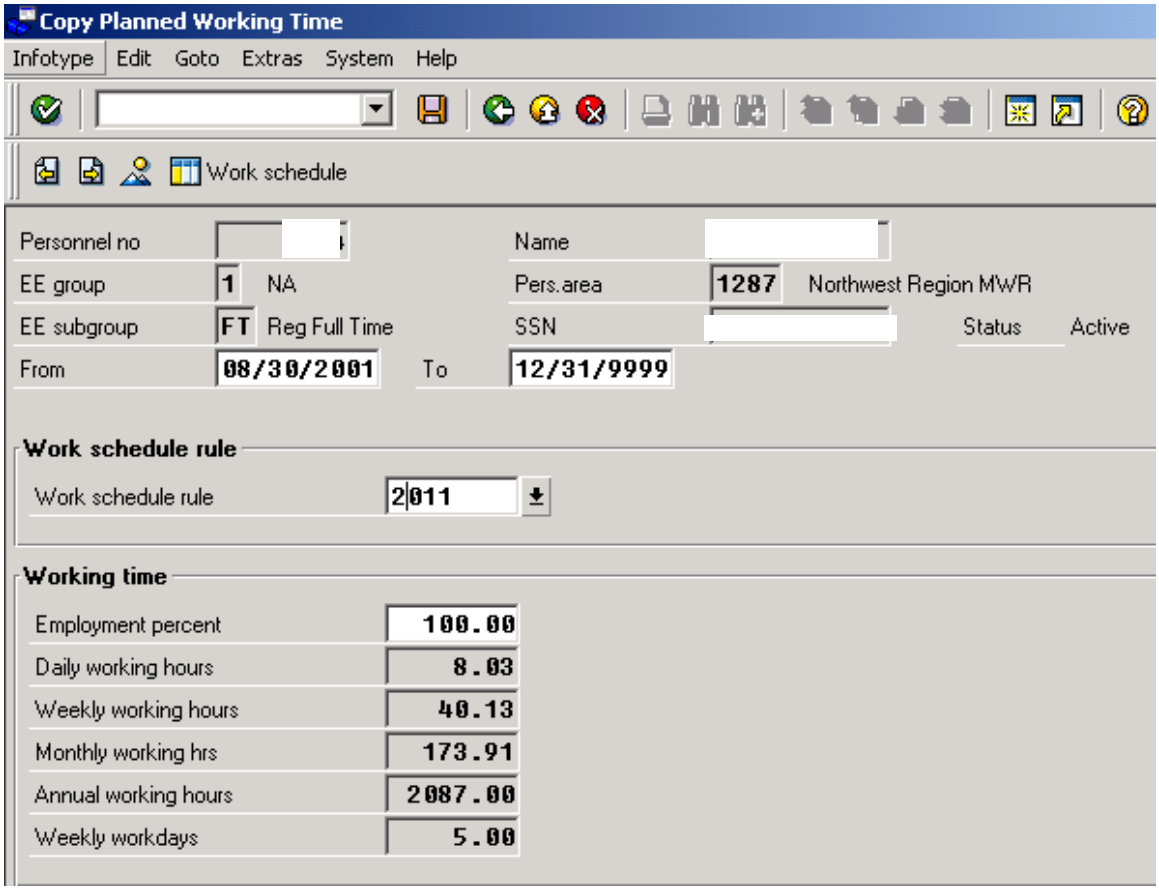
After saving the previous infotype the following one will appear:

Infotype 0006 – Addresses Emergency Contact



If information has not changed, just save. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

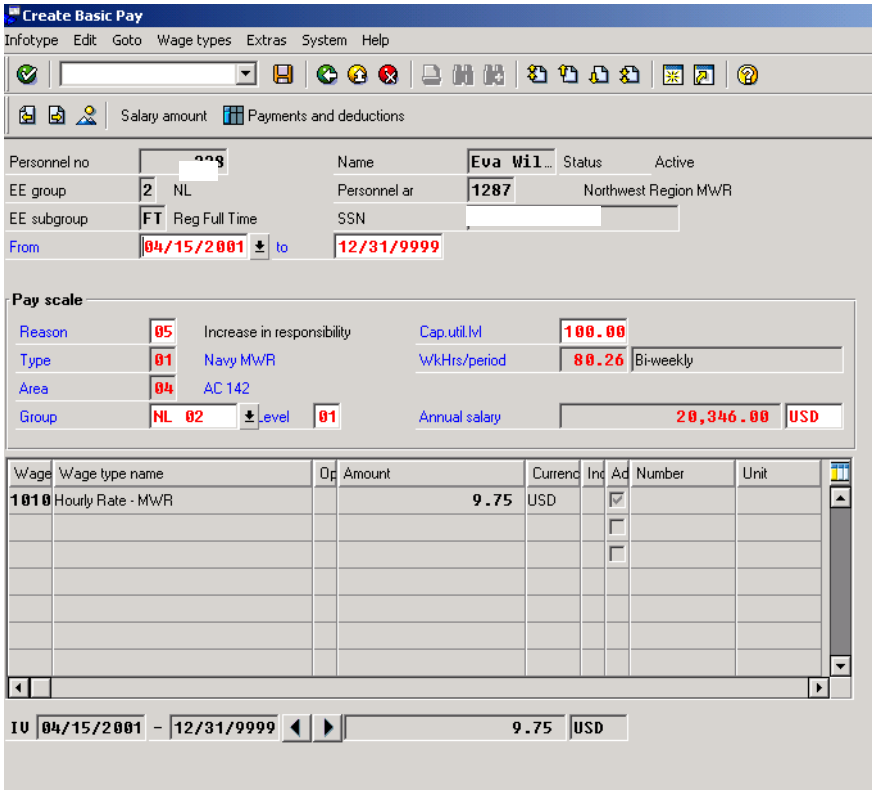
Infotype 0007 – Planned Working



Enter the new Work Schedule Rule for the employee. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

You will receive warning message to check the basic pay infotype 0008. Move through this warning message by pressing the Enter key and continue saving the new work schedule rule.

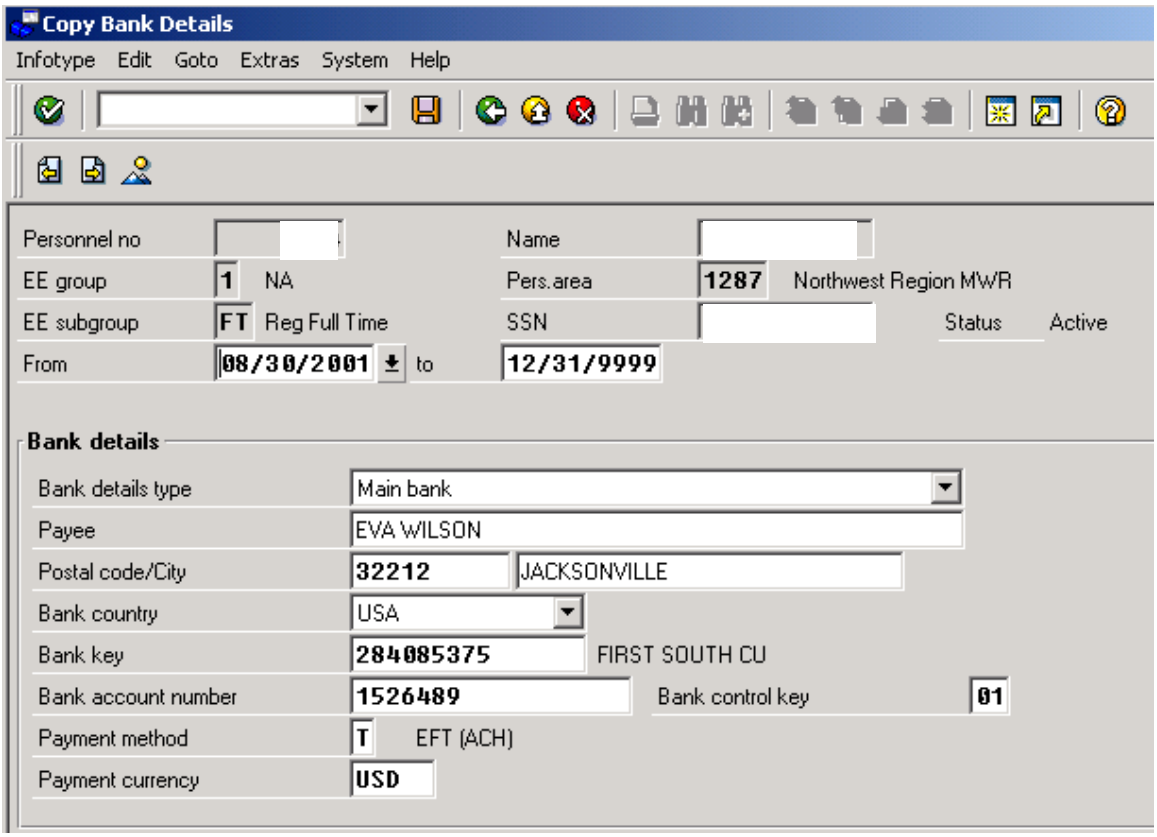
Infotype 0008 – Create Basic Pay



Enter any new basic pay information due to the position change of the employee. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

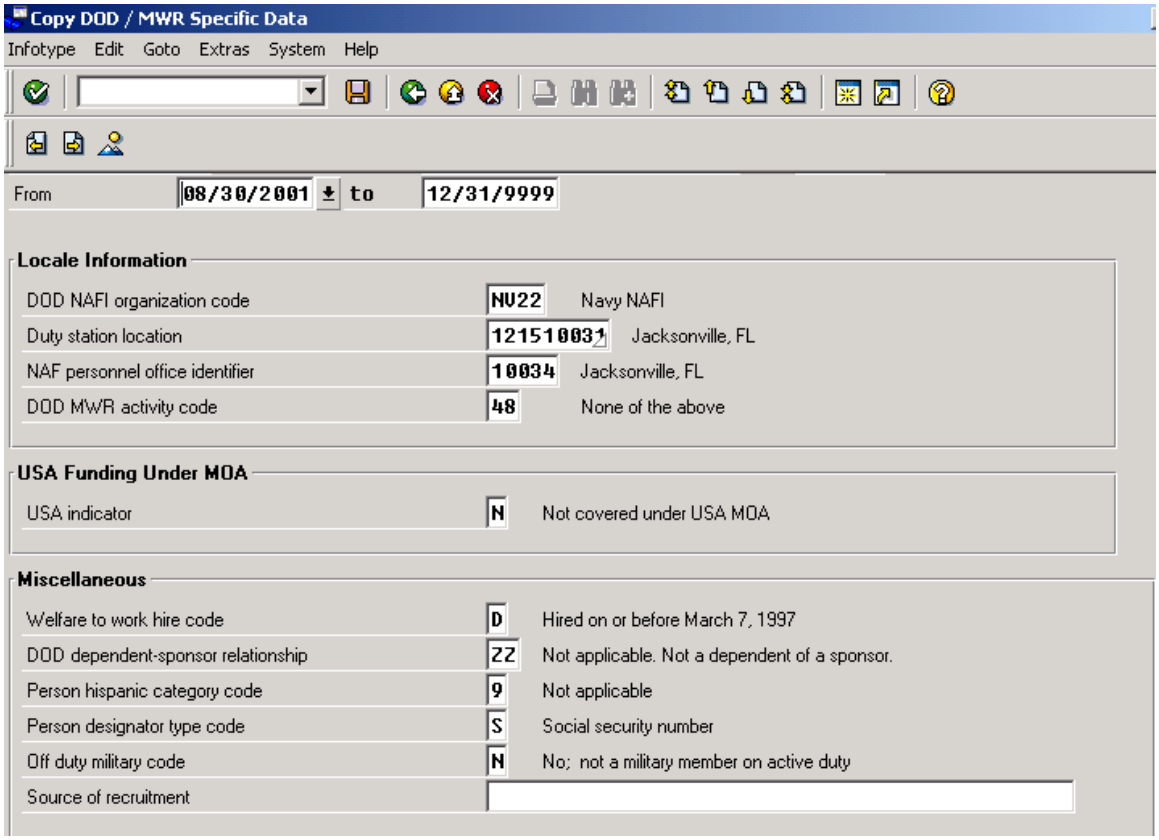
.

Infotype 0009 – Copy Bank Details



Note: If the bank information does not change, DO NOT save this record, right arrow through.

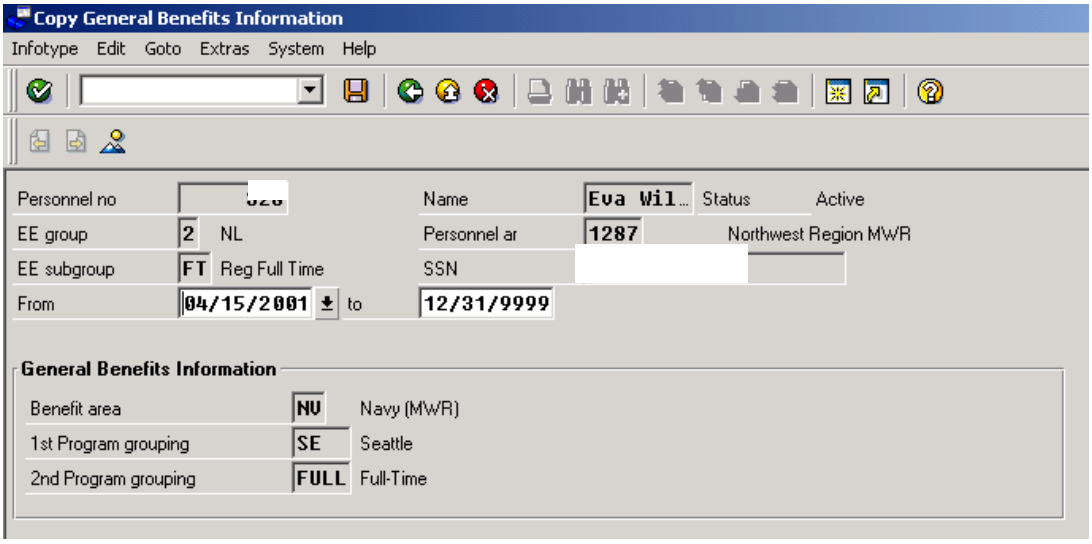
Infotype 9001 – Copy DOD/MWR Specific Data



You must change all applicable information due to the position change action.

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

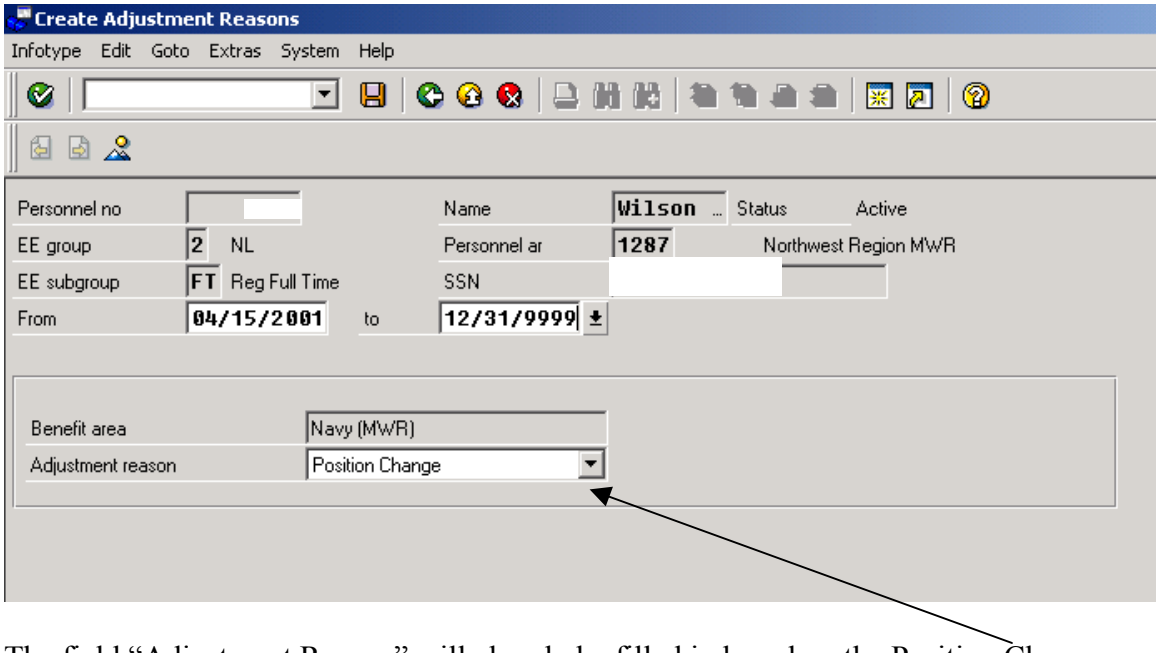
Infotype 0171 – Copy General Benefits Information



No data entry is required. Information will be populated based on the position information. **However, this record must be saved.**

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

Infotype 0378 – Adjustment reasons



The field "Adjustment Reason" will already be filled in based on the Position Change action. No entry is required. **However, the record must be saved.**

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

The Personnel Action Screen will be shown and the user receives the message **"Record Created".**

This process is now completed.

Note: If an employee is now eligible for benefits, follow the documentation for benefit enrollment.

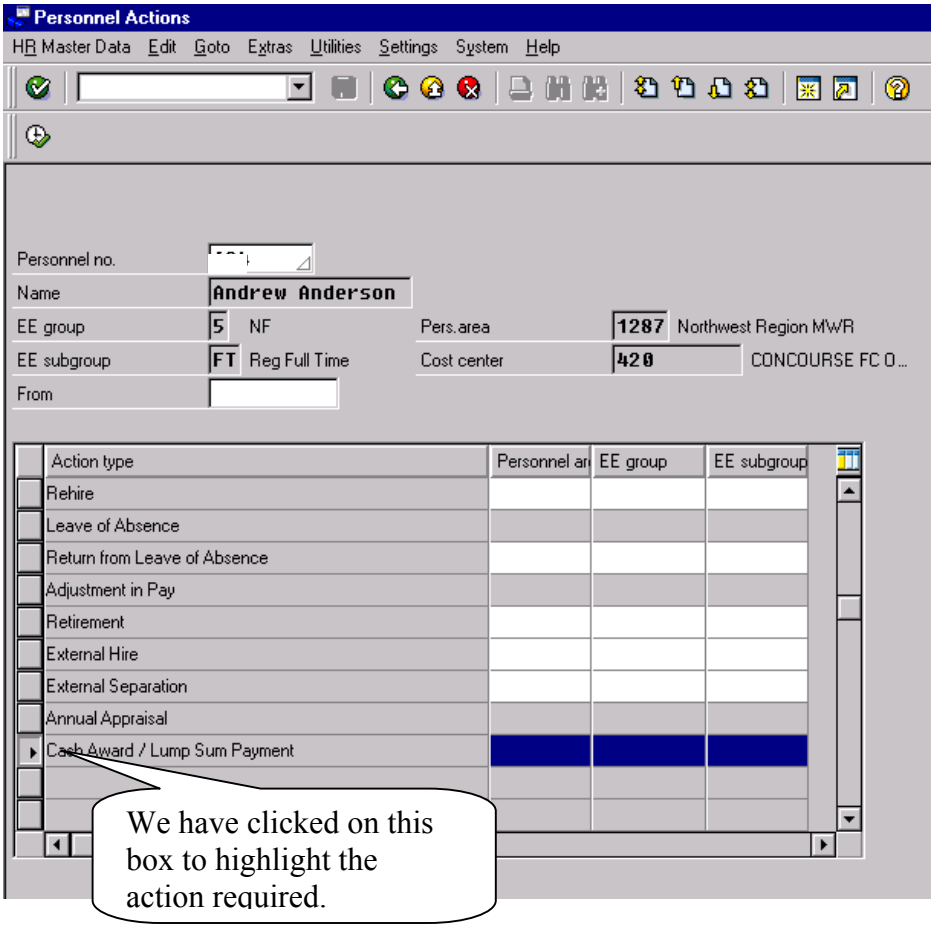
Process a Cash Award/Lump Sum Payment

This procedure describes the steps necessary to process a lump sum cash award through the SAP Human Resources system. Verify that you have all the approving documentation before starting the process. You will need a performance evaluation with two approving signatures and the award amount. **This process will be carried out at some time other than during the annual appraisal period**. The annual appraisal process also allows the awarding of a cash award.

Note: Email PAR to ADP payroll person for Cash Award Lump Sum

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTION**

Transaction Code: **PA40**

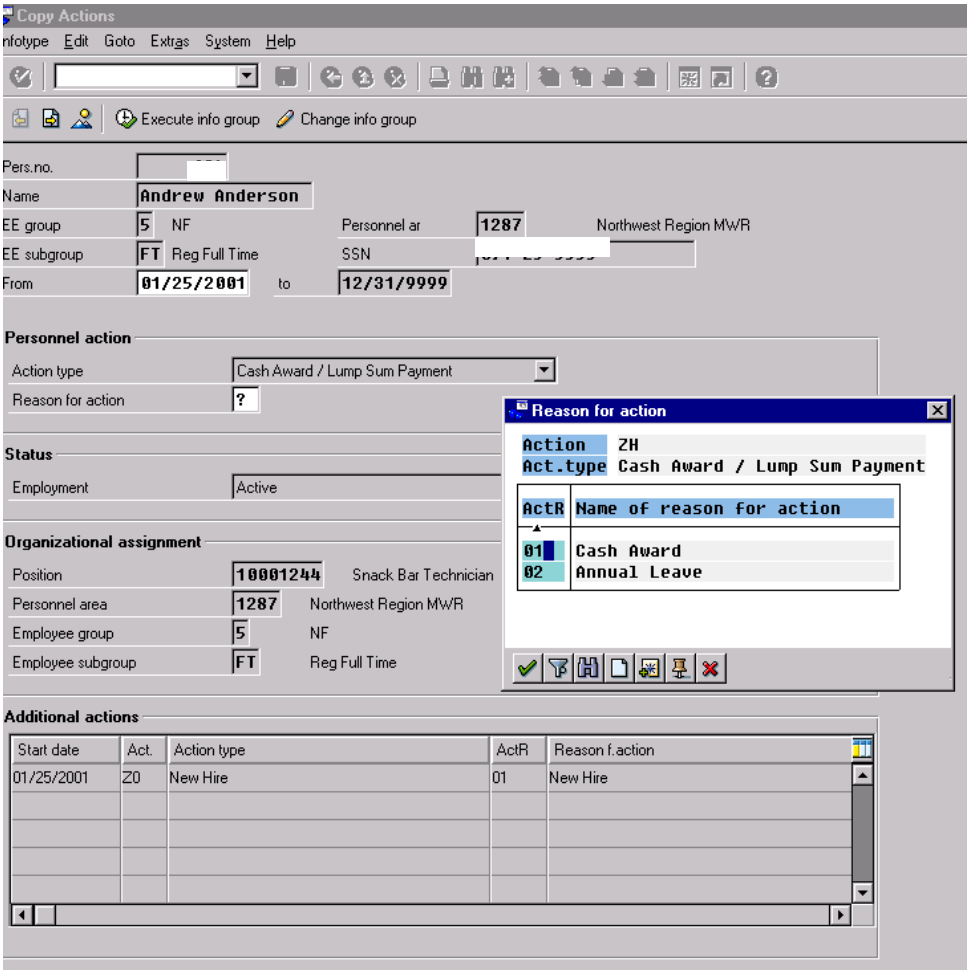


We have chosen Mr. Andrew Anderson to receive this lump sum cash award. We entered his personnel number directly into the field requesting the number.

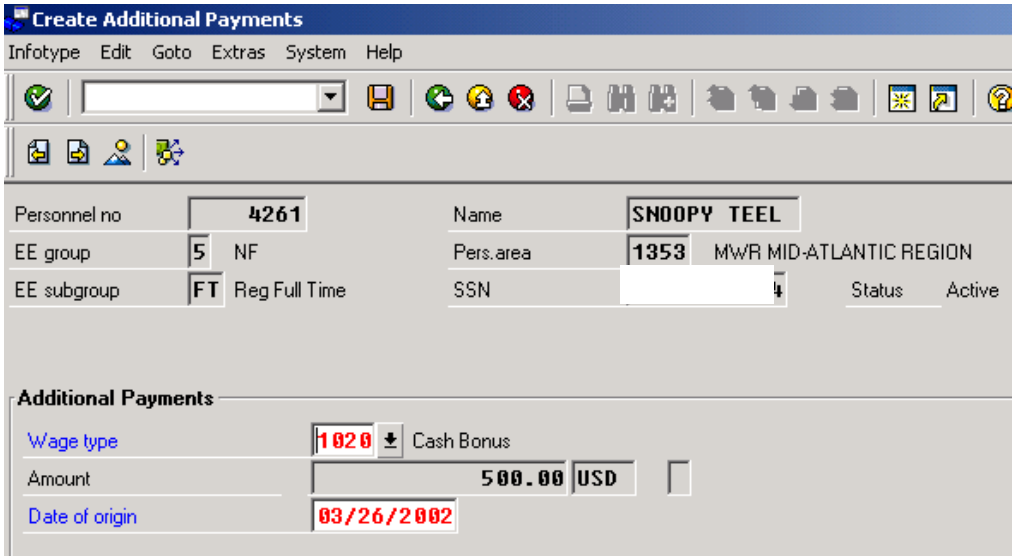
Field Name	Description	R/O/C	User Action/Values
Personnel Number	Employee Number	R	May be entered directly or searched for using the drop down arrow.
From	The date of the lump sum payment	R	Enter the first date of the pay period that the amount is to be paid.
Highlight the Cash Award Action	This is an entry in the action type listing	R	There is a small box to the left of the text describing the action. Click on the box to highlight.

Click on the Execute button .

The cash award action has been started and the applicable infotype will appear as shown below.



The screen above shows only one field available for data entry. The small window shows the only acceptable entry, **O1 – Cash Award.** Click on the Green check mark icon on the window and the entry will be copied on to the infotype. Save the transaction and the next screen in the transaction series will show.



Field Name	Description	R/O/C	User Action/Values
Wage Type	Used for payroll processing	R	"1020" will default. Do NOT change.
Amount	Dollar amount of the cash bonus	R	Enter the amount of the bonus
Date of Origin	The date the amount is to be paid	R	Enter the first day of the pay period that the amount is to be paid.

Save the transaction by clicking the Save icon . The result is that the infotype 0015 – Additional Payments is created and the action is complete. A PAR will be created to show that the employee received a cash award.

Enter dollar amount of cash bonus in "Remarks" section of PAR before emailing to payroll. Review the instructions for emailing the PAR to payroll. Email PAR to ADP payroll person.

Process the Annual Appraisal Documentation into SAP

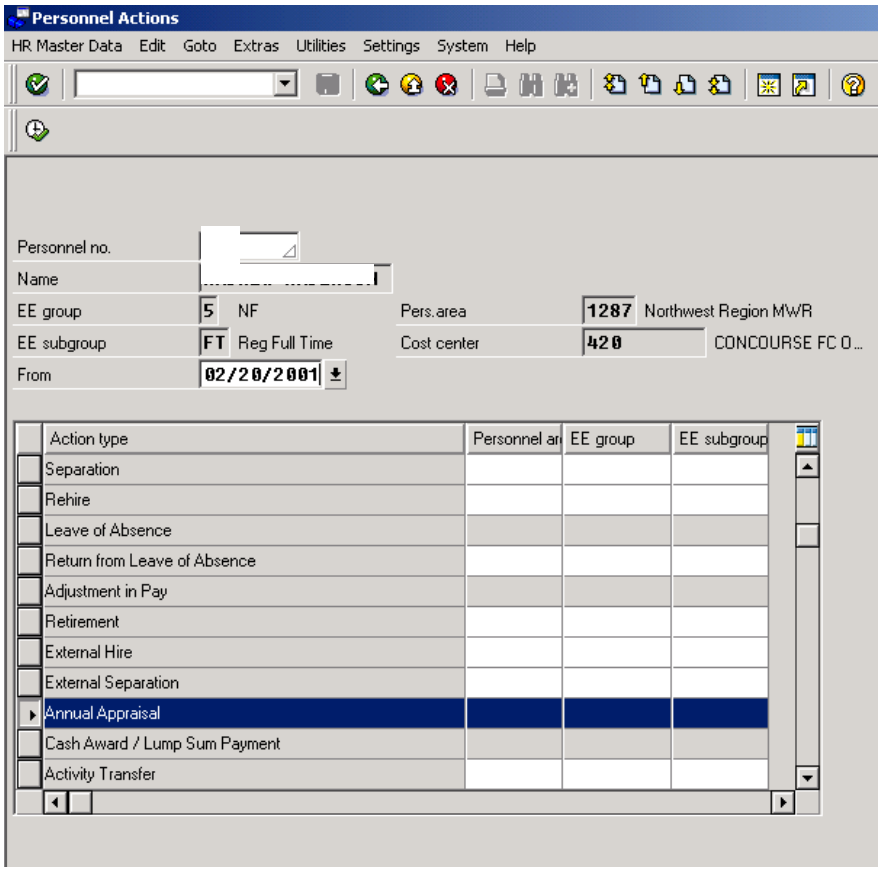
USE THIS PROCESS ONLY FOR ANNUAL APPRAISALS

BEFORE YOU BEGIN THE ANNUAL APPRAISAL VERIFY THAT THERE ARE NO OTHER ACTIONS ALREADY CREATED WITH THE SAME DATE AS THE ANNUAL APPRAISAL
USE PA20-DISPLAY –TO VERIFY

This procedure describes the steps necessary to process the annual appraisal (Evaluation) documentation through the SAP Human Resources system. This process will be carried out during the annual appraisal period. The annual appraisal process allows the awarding of a cash bonus as well as an increase in pay to certain classes of employees. However, the key part of the appraisal process is to inform the employee and to document their progression toward becoming a more valuable part of the organization.

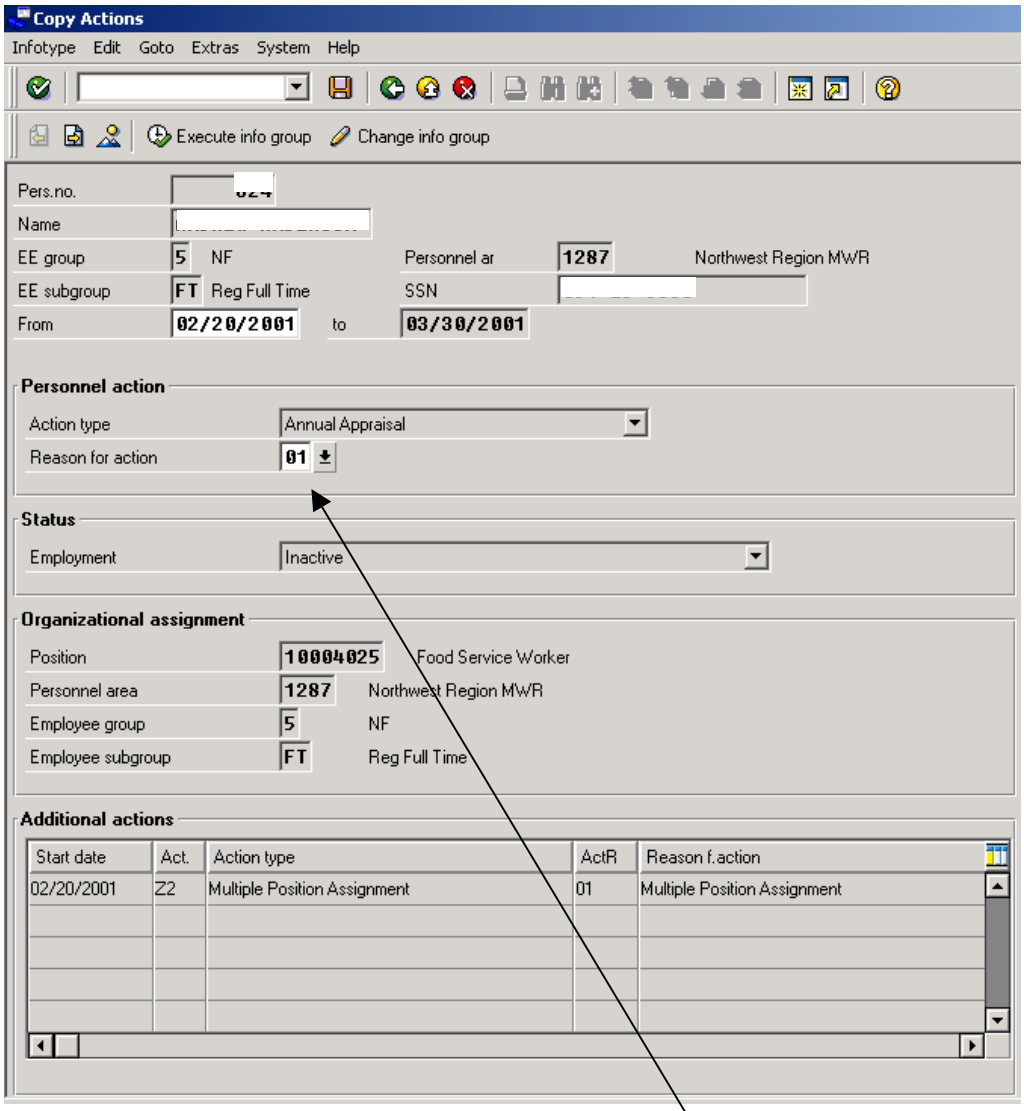
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**



We have picked the employee ready for his annual appraisal, Mr. Andrew Anderson, Personnel No. 624 by directly inputting the number. **Enter the first date of the pay period after the approving official signs and updates the appraisal** and clicked the small box to the left of the text describing the action type, Annual Appraisal.

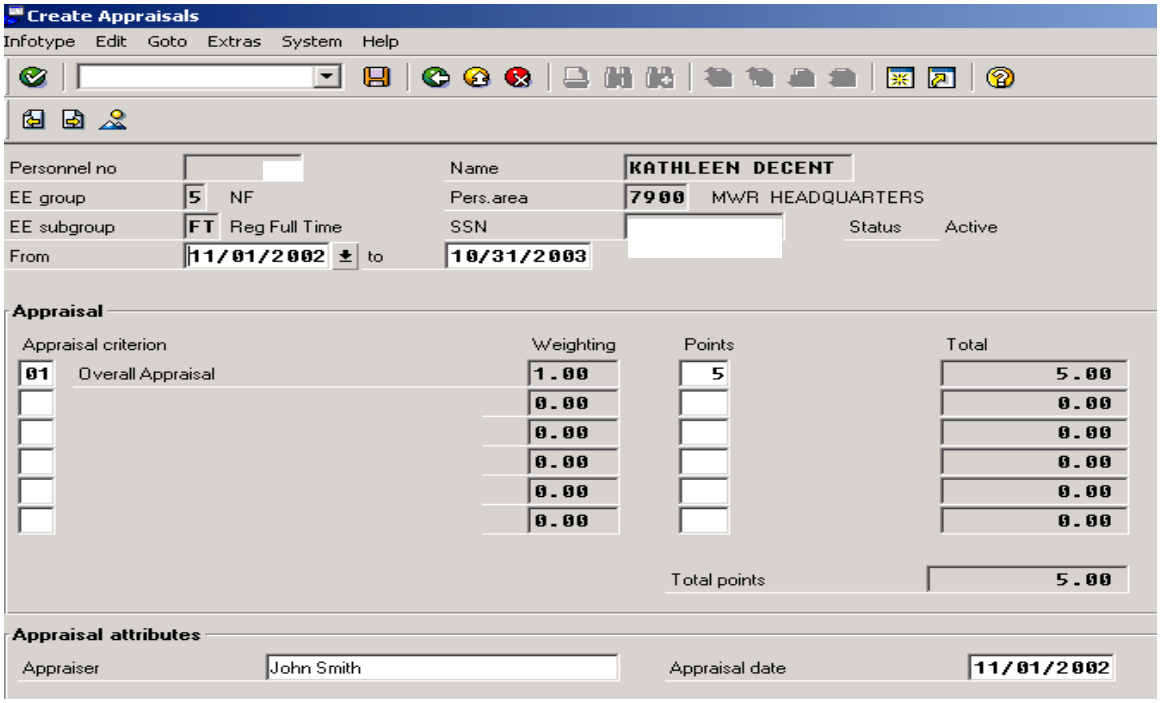
We now click the Execute icon to start the recording of the results of the appraisal.



In the Personnel Action section of the screen, we must enter the reason for the action using the drop down arrow to select "Annual Appraisal – 01"

Press the enter key to validate the entries and then click the Save icon .

The infotype 0025 – Create Appraisals screen appears:



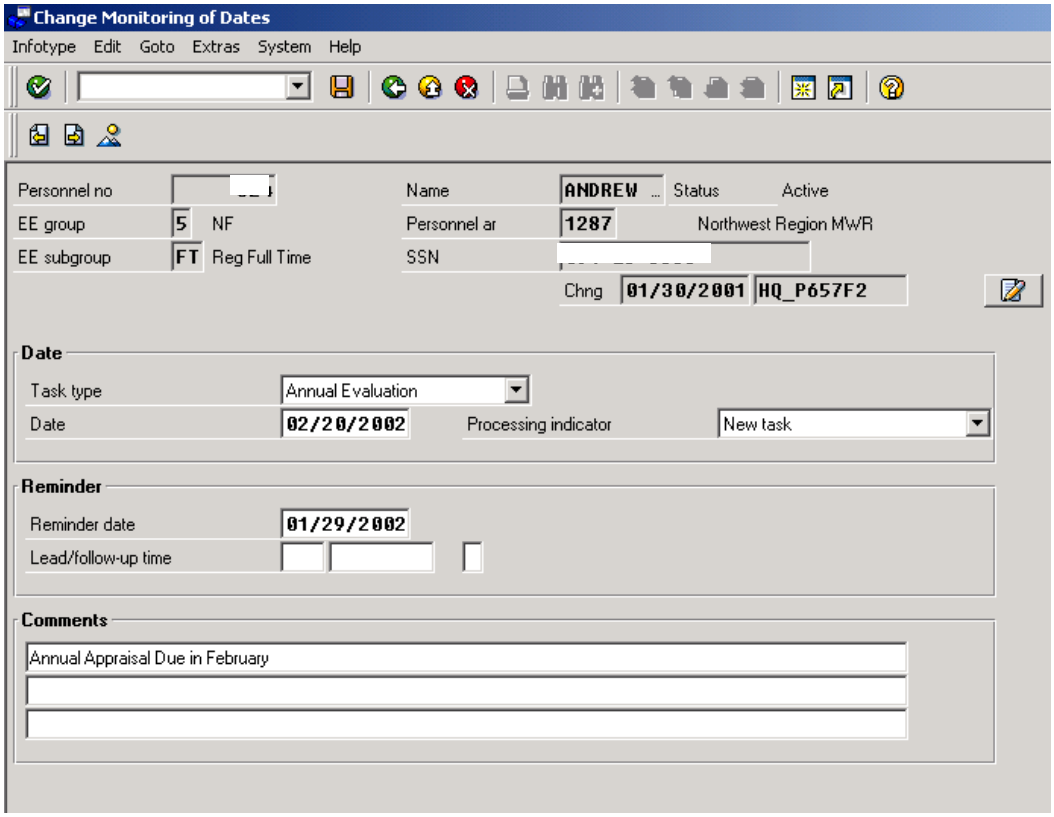
Field Name	Description	R/O/C	User Action/Values
Note: Due to conversion, all begin dates cannot be prior to your conversion date. Otherwise, enter the actual from and to dates.			
From Date	The beginning date of the appraisal.	R	This date will default to the begin date of the action. It may be changed, but cannot be prior to the conversion date.
To Date	The end date of the appraisal	R	Enter the end date of the appraisal, normally one year.
Appraisal Criterion	Value will default to 01	R	Will default to **01- Overall Appraisal**
Points	The score of the employee's appraisal.	R	Enter the score from the appraisal form.
Total Points	Will be calculated by the system	R	See below for evaluation rating points.
Name of Appraiser	Name of the appraiser	R	Enter the last names of the 1st and 2nd level appraisal officials.
Appraisal Date	Date the appraisal was approved	R	Enter the date the employee signed the appraisal.

5 = Outstanding, 4 = Highly Satisfactory, 3 = Satisfactory, and 0 = Less than Satisfactory.

Press the Enter button or key to validate the entries.

Save the transaction by clicking the Save icon. . The system automatically rolls to infotype 19 – Monitoring of Dates.

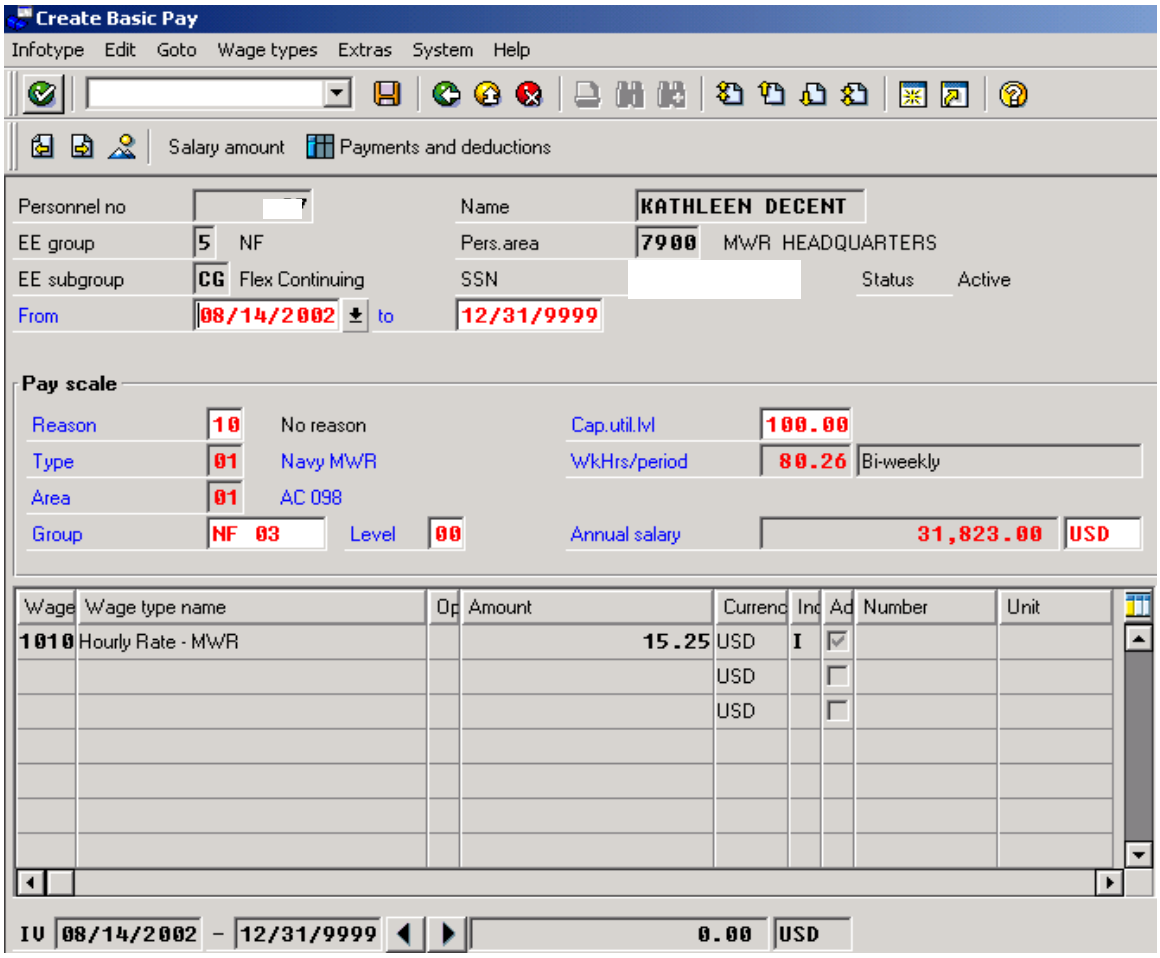
Infotype 0019 – Create Monitoring of Dates



The information for task type and dates default from other infotypes. Select and save using .

The next infotype that must be completed is 0008 – Create Basic Pay.

Screen: 0008 – Create Basic Pay



Use reason code for Annual Appraisal. Select by using drop down arrow. Complete group based on Employee Position. The amount to be entered will be the new appraisal rate, or the employee's previous rate is no increase is given.

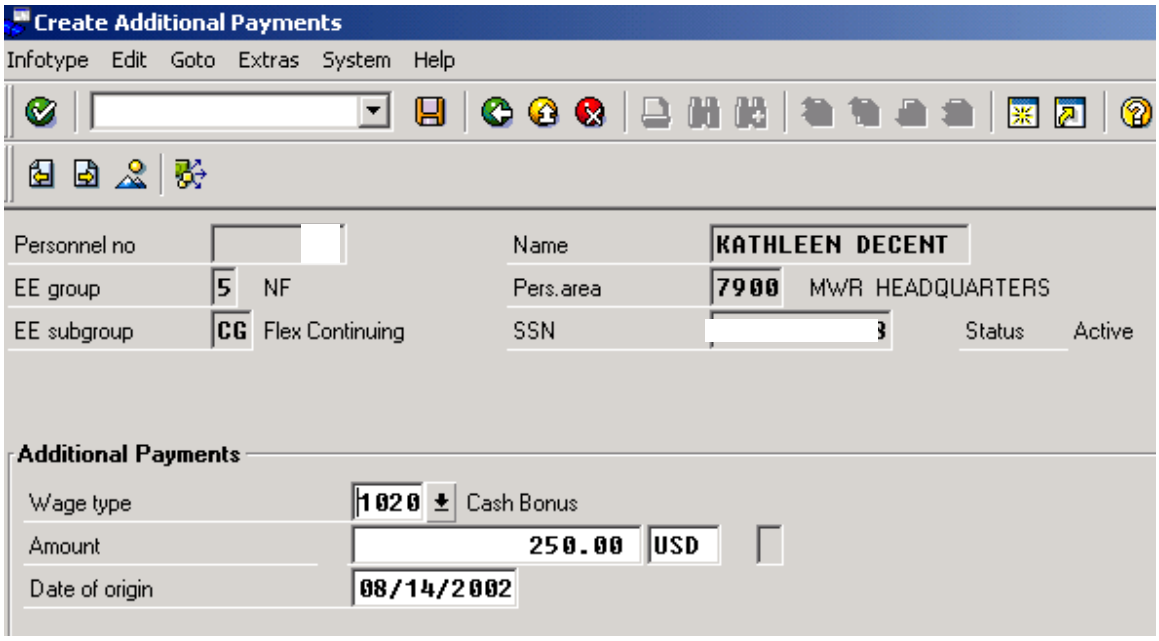
You can save this screen with the same basic pay if no increase is being given, BUT <u>you must always save the basic pay record with an annual appraisal.</u>

Press the Enter button to validate the entries. Save the transaction by clicking the Save icon.

The next infotype is infotype 0015 – <u>Create Additional Payments</u>. This is used to make a one-time payment to the Employee.

If a bonus is not being given right arrow to the next infotype

Create Additional Payments



Field Name	Description	R/O/C	User Action/Values
Wage type	Type of payment	R	Enter 1020 Cash Bonus or select using drop down arrow
Amount	Dollar amount	R	Enter dollar amount of payment
Date of origin	Date of payment	R	Defaults based on action date

This completes the actions needed for annual appraisal. If cash award is given, follow instructions for printing hard copy and emailing PAR.

Process an Adjustment in an Employee's Pay

Note: Promotions are to be processed under Change in Position Action

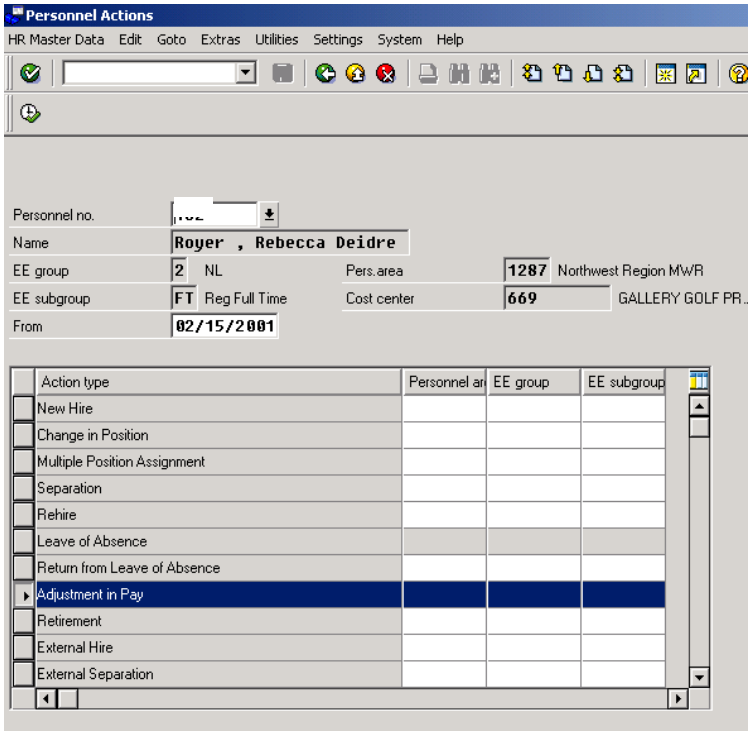
This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

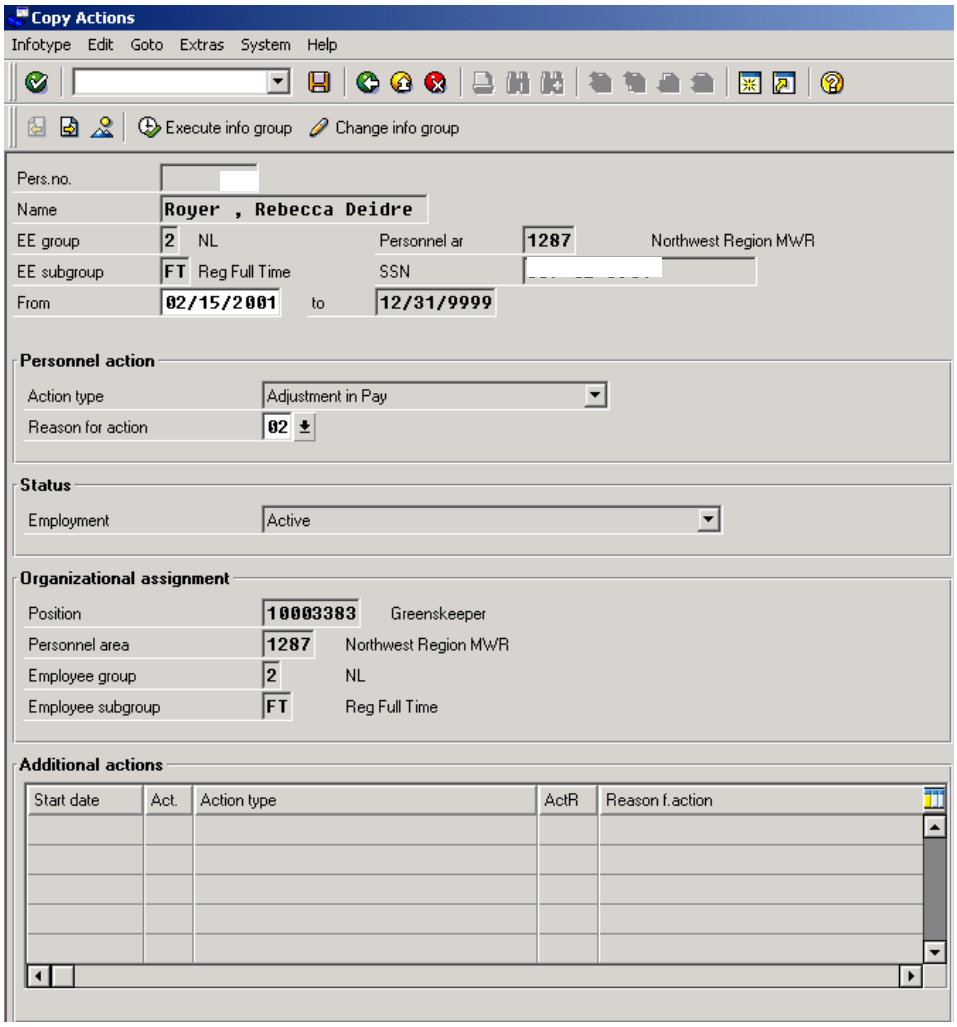


We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process “Adjustment in Pay” and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button

The resulting effect is to start the recording of the adjustment in Pay. The first screen, as shown below, is the Copy Actions infotype and the only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

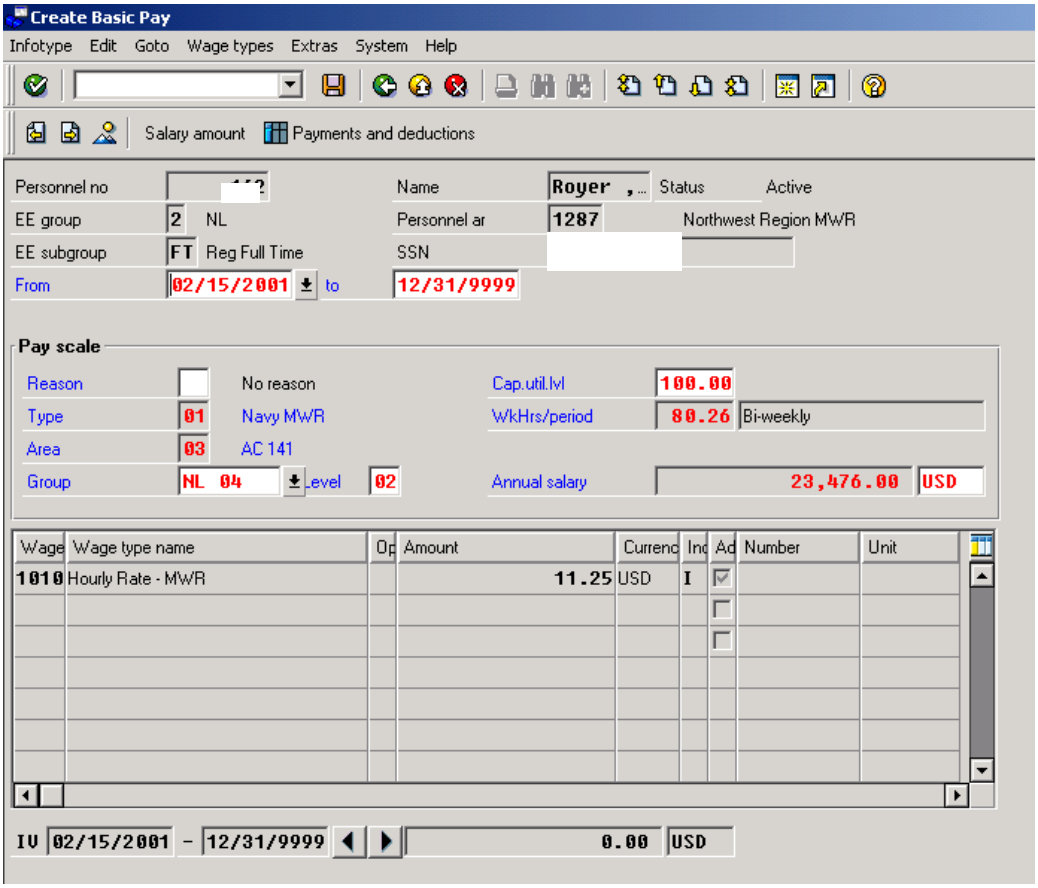
Copy Actions



Press the Enter button or Enter key to validate the entries. A warning message appears, "Record will be delimited", Select the to acknowledge the system message. Enter and save the transaction by clicking the Save icon.

Infotype 0000 is created and infotype 0008 – Create Basic pay will be shown.

Create Basic Pay



We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

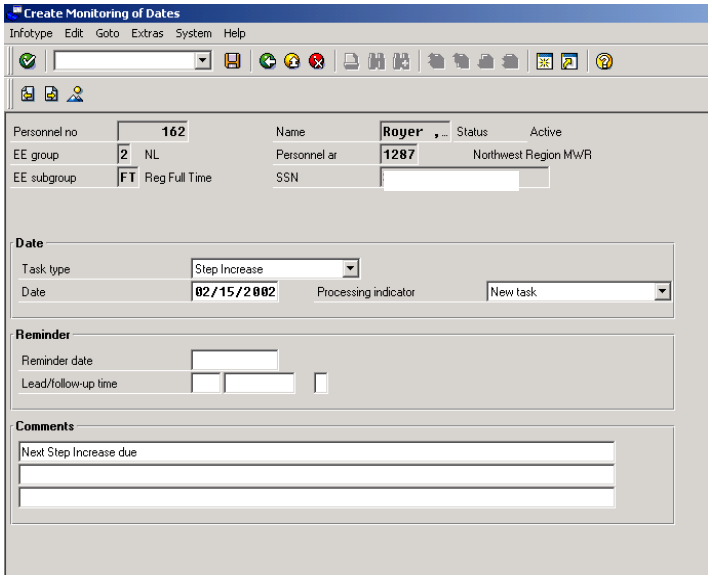
Field Name	Descriptions	R/O/C	User Action/Value
Reason	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
Type	User defined	R	Will default in Navy MWR
Area	User defined	R	Will default in the area
Group	User defined	R	Enter the employee's group using the drop down menu to select. User MUST verify for accuracy.
Level	Level of Pay	R	Will default based on the entry in the group field. User MUST verify for accuracy.

Hourly Rate Wage types: 1010 = Hourly rate	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. **Note: NA, NL, & NS groups will populate hourly rate. NF and CC wage rates must be entered.**
Annual Salary	Annual Salary	R	This field will default as no entry is allowed.
Capt util. Lvl	Used for annual salary calculation	R	The field defaults "100" Note: This field must NOT be changed.
Work/Hrs Period	Work hours in a period	R	This field will default in.

Press the Enter button or key to validate the entries. The system generates a warning message, "Record will be delimited", Click to acknowledge the message.

Save the transaction by clicking the Save icon.

Infotype 0008 is validated and the next screen Infotype 0019 – Monitoring of Dates is put into the action.



Enter button or key, and save the transaction. The Adjustment in basic pay action is complete.

Follow the instructions in Chapter 3 for printing and/or emailing PAR.

Process a Step Increase

Note: Promotions are to be processed under Change in Position Action

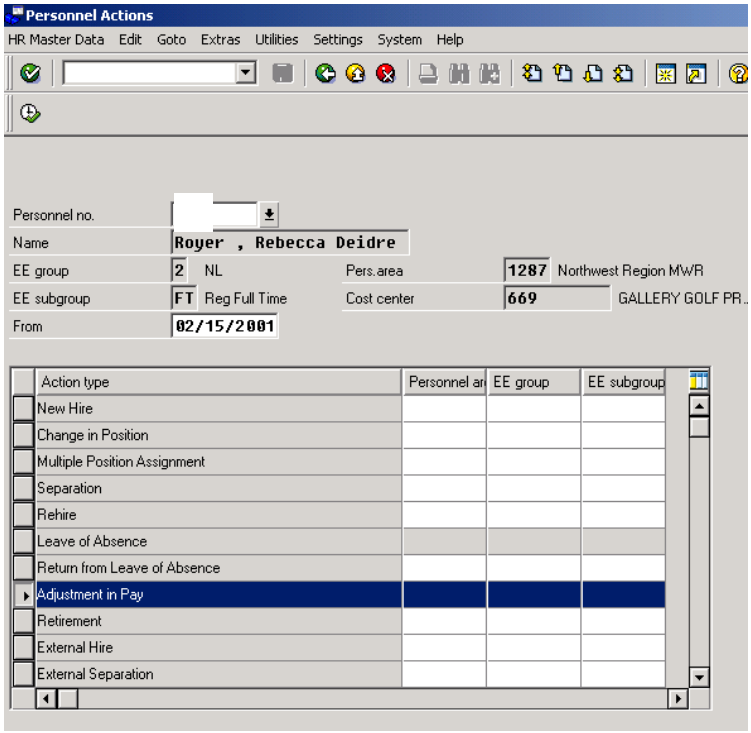
This procedure describes the steps necessary to process an adjustment in pay through the SAP Human Resources system. Adjustments in pay are made for the following reasons:

ActR	Name of reason for action
01	New Pay schedule change
02	Change pay rate
03	COLA increase
04	Change in responsibility
05	Correction of an error

Be sure that you have all the appropriate, approved back-up documents, i.e., for merit increases, a performance evaluation with two levels of approval; for schedule changes, an approved pay schedule and the Commanding Officer's approval to give the pay increase, etc.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

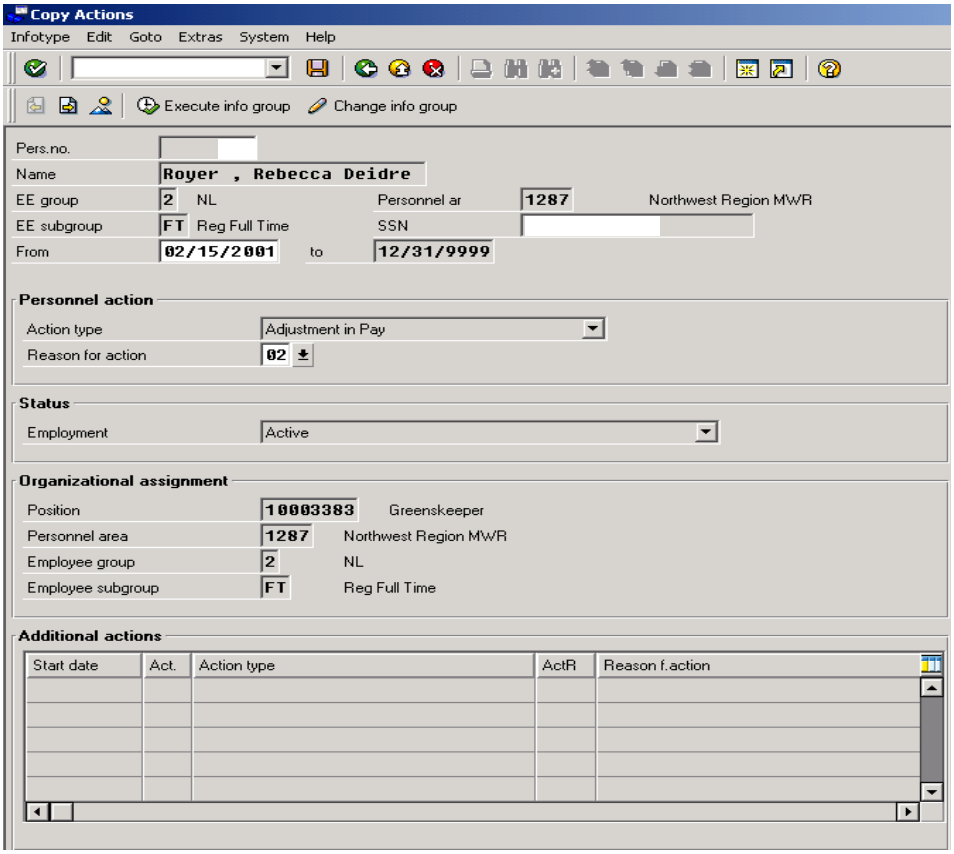


We have chosen the employee by directly entering the Personnel Number 162, Ms. Rebecca Royer, we have highlighted the action we wish to process "Adjustment in Pay" and we want this adjustment to be effective from the first day of the payroll period.

Click the Execute button

The system will roll to Infotype 0000 – **Copy Actions.** The only entry allowed here is to enter the reason for the pay adjustment using the drop down arrow. For example, the reason is shown as 02 – Change Pay Rate.

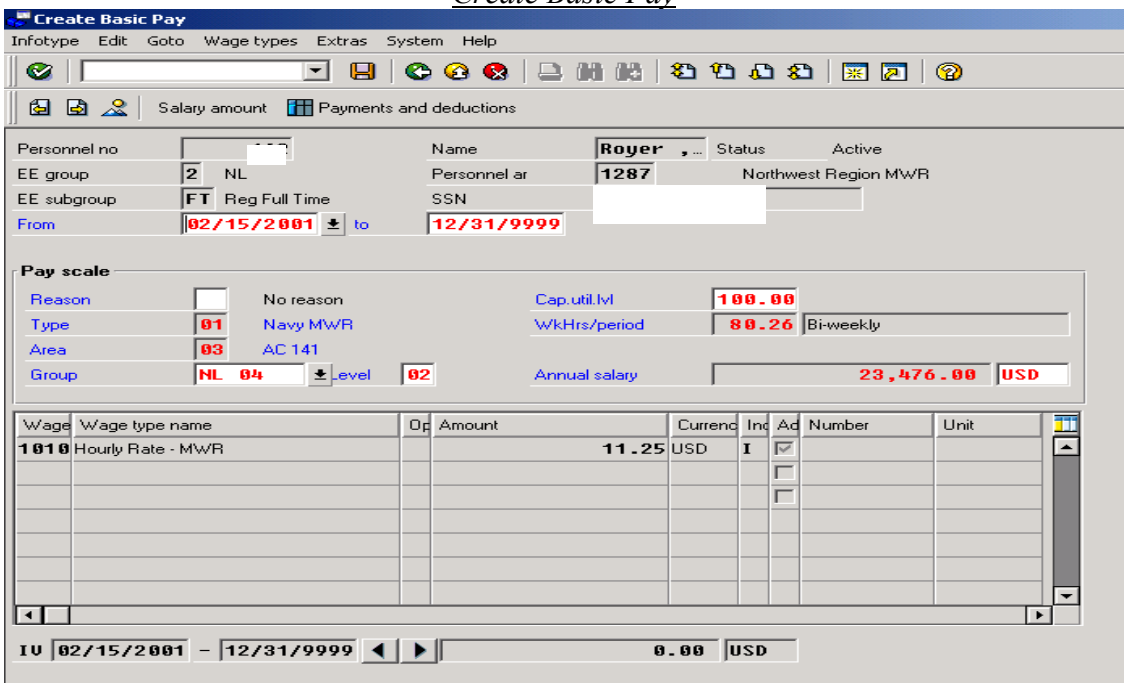
Copy Actions



Press the Enter button or Enter key to validate the entries. A warning message appears. Select the to acknowledge the system message. Enter and save the transaction by clicking the Save icon.

Infotype 0000 is created and infotype 0008 – Create Basic pay will be shown.

Create Basic Pay



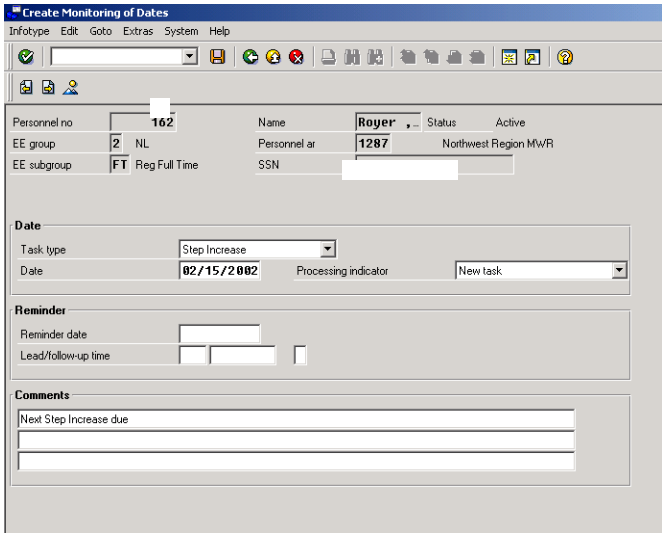
We have changed the Hourly rate of pay to 11.25 to reflect the Increase in pay

Field Name	Descriptions	R/O/C	User Action/Value
Reason	Reason for this change in the infotype	R	You may use the dropdown menu for your selections
Type	User defined	R	Will default in Navy MWR
Area	User defined	R	Will default in the area
Group	User defined	R	**Enter the employee's group using the drop down menu to select.** User MUST verify for accuracy. .
Level	Level of Pay	R	Will default. User MUST verify for accuracy.
Hourly Rate **Wage types:** **1010 = Hourly rate**	Enter correct rates for each wage type listed	R	Enter the hourly rate(s) or have the rate(s) default if the annual salary field is populated. **Note: NA, NL, & NS groups will populate hourly rate. NF and CC wage rates must be entered.**
Annual Salary	Annual Salary	R	This field will default.
Capt util. Lvl	Used for annual salary calculation	R	The field defaults "100" Note: This field must NOT be changed.
Work/Hrs Period	Work hours in a period	R	This field will default in.

Press the Enter button or key to validate the entries. The system generates a warning message. Click to acknowledge the message.

Save the transaction by clicking the Save icon.

Infotype 0008 is validated and the next screen Infotype 0019 – Monitoring of Dates is put into the action.



We have entered the Task Type, which was the "**Step Increase**" type of task; "**New Task**" defaults Processing indicator and entered some comments regarding when the next step increase is due. If no entry is required, "right arrow" through this screen. Press the Enter button or key, and save the transaction. The Adjustment in basic pay action is complete.

Follow the instructions in chapter 3 for printing and/or emailing PAR.

NOTE: Enter the last day worked as the date of the action. The system will roll to the next date for the termination date. Enter information in remark section of PAR.

Process a NAF Employee Separation

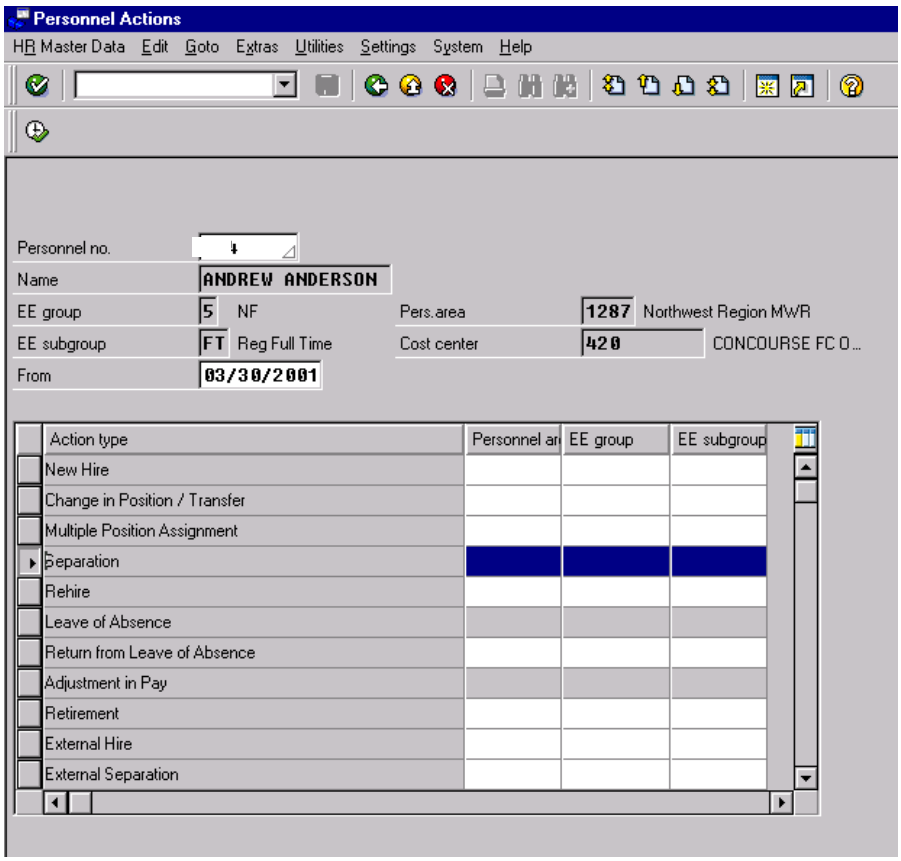
This procedure documents the steps required to process an employee due for separation for any reason.

This action uses the copy mode for several infotypes. It is important that you remember that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the Enter key, you should receive a warning telling you that the previous record will be delimited. This verifies that you want to make the change and that you have changed the From date to reflect that your record will now be the current one. You may proceed through the message by using the Enter again and you will then be prompted to Save your record

Menu path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

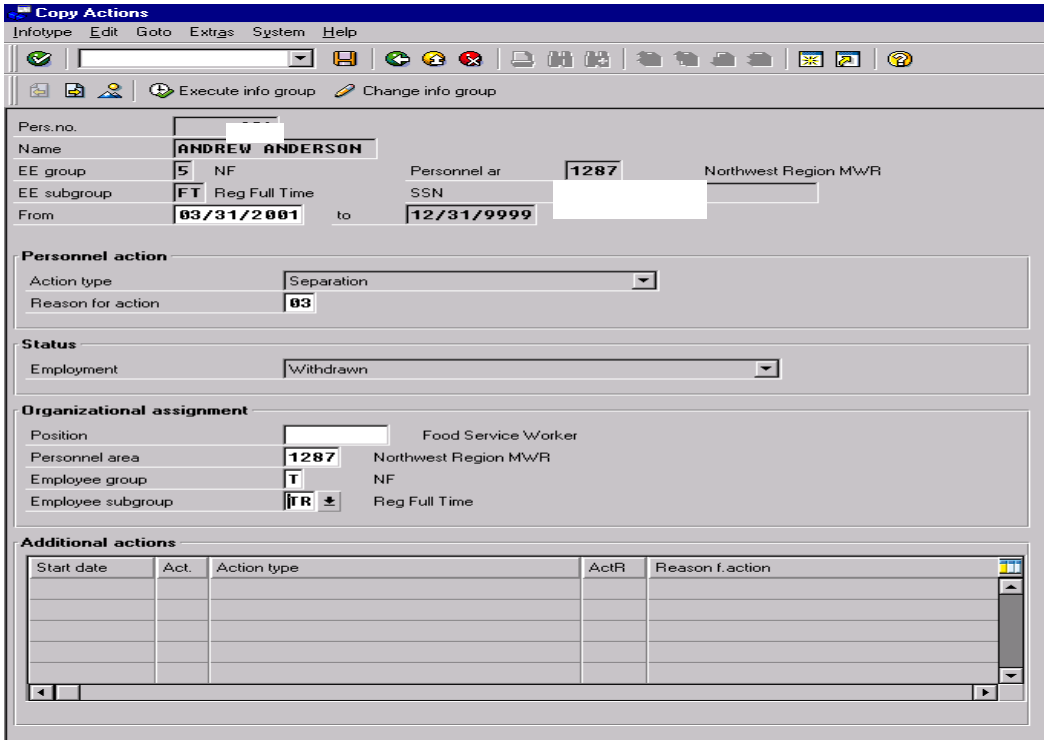


Field Name	Description	R/O/C	User Action/Values
Personnel Number	The system generated Personnel ID Number	R	Enter the personnel number, if known. Use the dropdown arrow to aid in the selection.
From date	The date the action is effective	R	Enter the last worked date. The date for separation will roll to the next day.
Action Type	The type of action that is to be performed	R	Select and highlight the Separation action.

Select the Execute icon .

The system will roll to Infotype 0000 – Copy Actions

Copy Actions



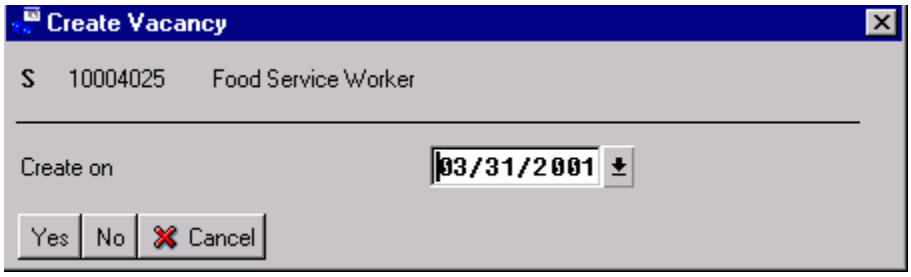
Field Name	Description	R/O/C	User Action/Values
Action Type	Separation	R	This field will default in
Reason for Action	The reason the action is being performed	R	Use the drop down arrow to aid in the selection.
Employment	User defined	R	This field will default in with **"Withdrawn"**
Position	User defined	R	Blank out position number
Personnel Area	The assigned area of the position within the organization	R	This field will default in **DO NOT CHANGE**
Employee Group	The group of employees that the individual has been assigned to	R	This field will default in. **MUST be changed to "T"- separated.**
Employee SubGroup	The assigned subgroup for the employee	R	This field will default in. **MUST be changed to "TR"- terminated.**

Press the Enter

You will receive a message that the previous infotype will be delimited.

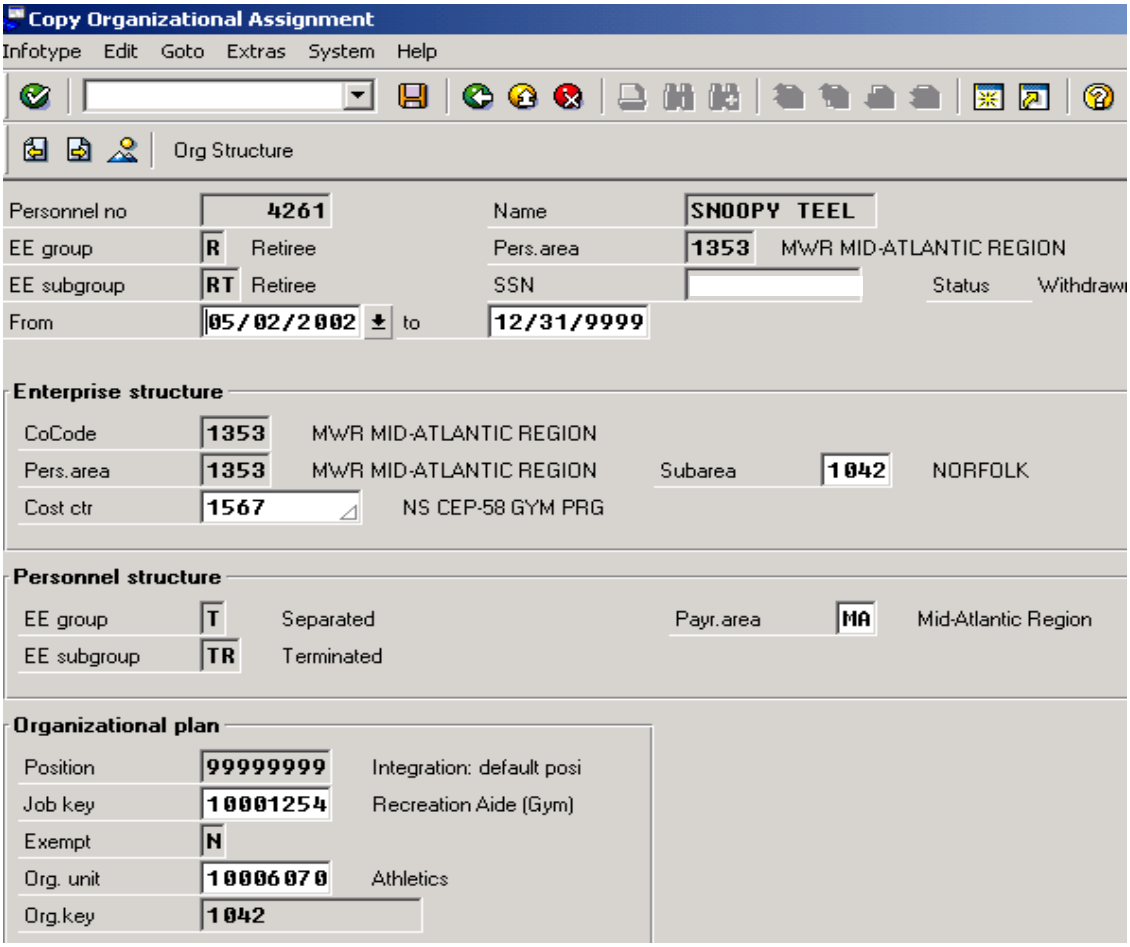
Press Enter again.

The Create Vacancy informational window will appear. Select the “Yes” button and Save the transaction. . If necessary, change the date on this window to the termination date.



Save the transaction by pressing the Save icon .

The screen will roll to Infotype 0001 – Copy Organizational Assignment.

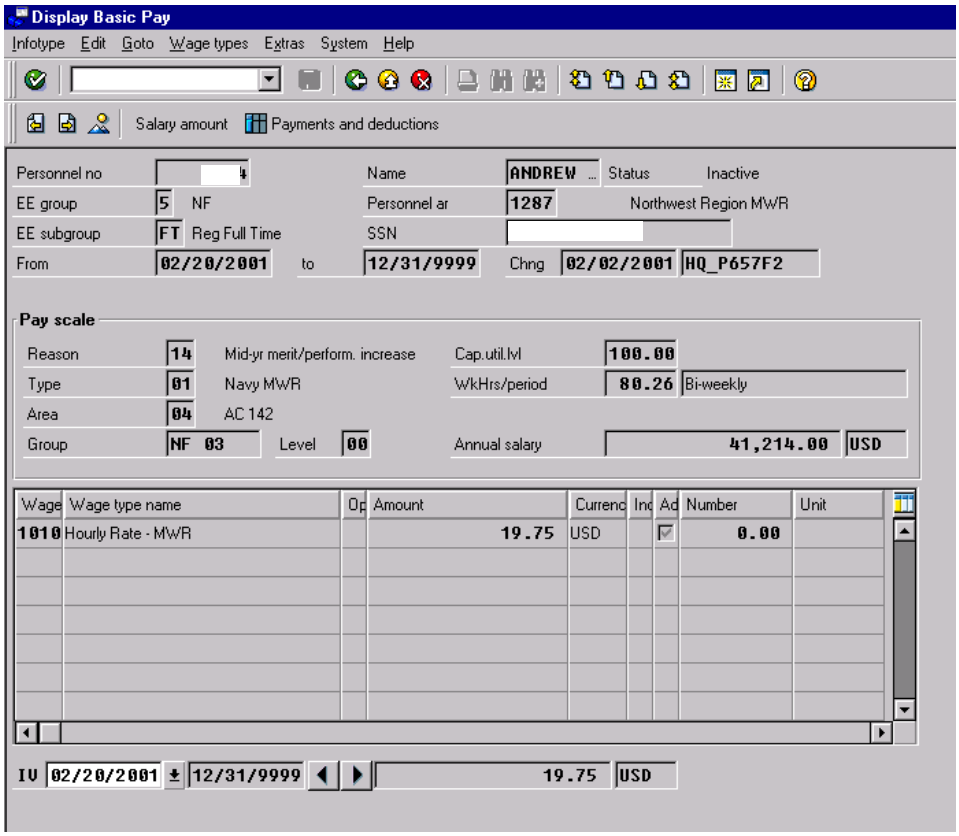


Field Name	Description	R/O/C	User Action and Values
Co Code	Company Code	R	This field will default in.
Pers Area	Personnel Area	R	This field will default in.
Cost Ctr	Cost Center	R	This field will default in.
Subarea	Personnel Subarea	R	This field will default in.
EE Group	Employee Group	R	This field will default in.
EE Subgroup	Employee Subgroup	R	This field will default in.
Payr Area	Payroll Area	R	This field will default in.
Position	Position number	R	This field will default in.

All of the fields will default in. Validate the entries and Press the Enter key . You will receive the warning "**this entry will delete a record**". Press the Enter key .

Save the transaction by pressing the Save icon .

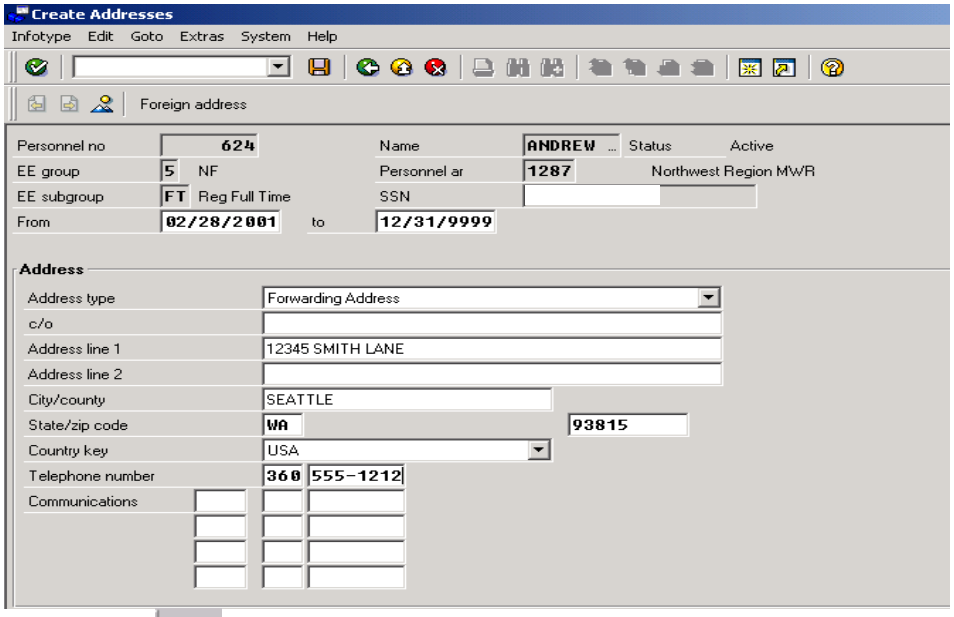
The system will now show Infotype 0008 – Display Basic Pay as shown below:



Right arrow, using the next record icon, through the Display Basic Pay screen.

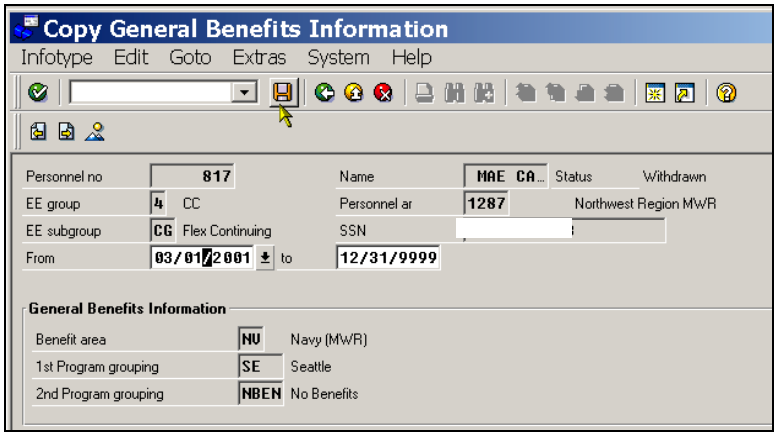
The system will now display infotype 0006 – Create Addresses subtype 6 – Forwarding Address.

Infotype 0006 – Create Addresses subtype 6 – Forwarding Address. This screen must be completed for a separated employee. **Do not change the permanent address – only the forwarding address needs to be created**. **If you change the permanent address the employees' taxes will be effected.**



Press the Enter key . Read the Record delimited warning message. Press the Enter key again . Validate the entries.

The system will now show infotype 0171 – General Benefits Information. There are no entries required for this infotype record but the dates must be verified and the infotype saved.

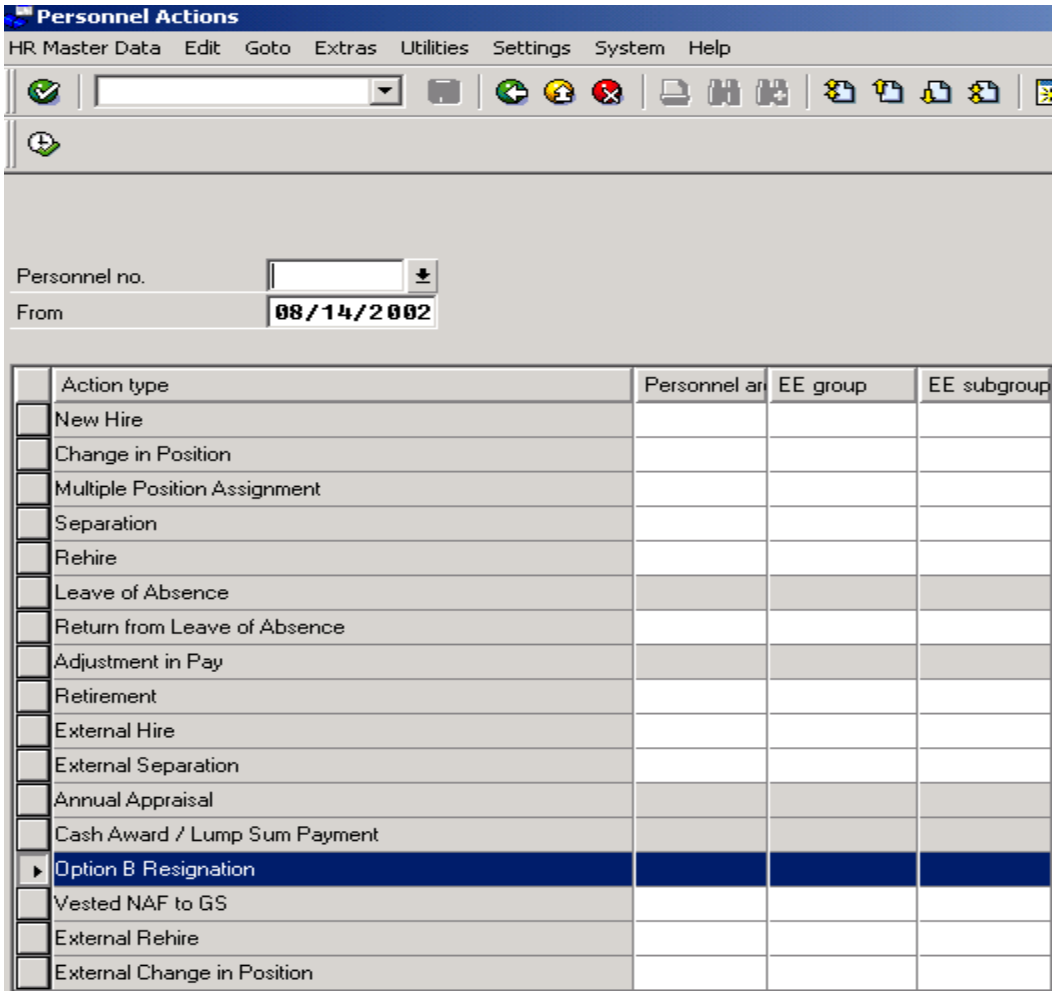


Save the transaction. . Record will be created. The system will return to the Personnel Actions Screen.

Separation/Option B Retirement

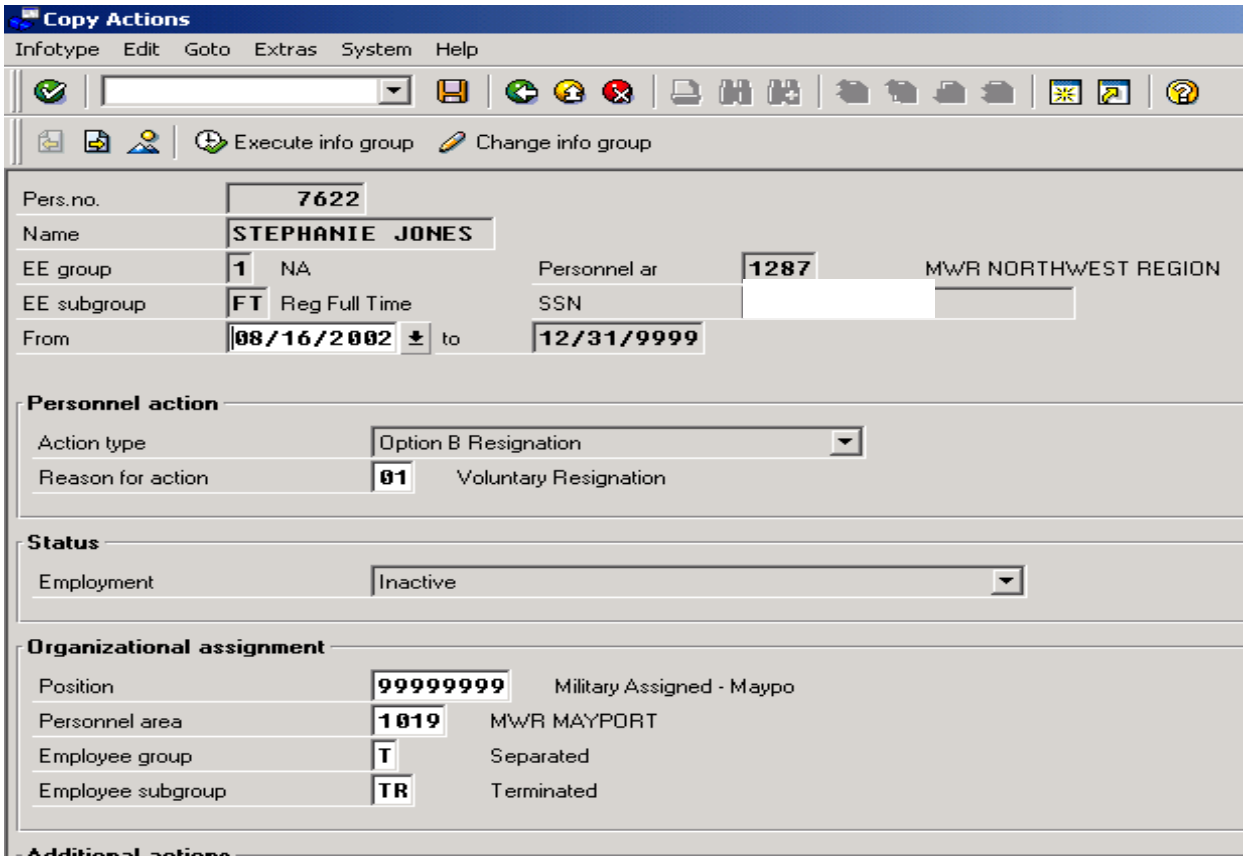
Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction code: **PA40**



Field Name	Description	R/O/C	User Action/Values
Personnel Number	EE number	R	Enter the number if known, or search using the drop down arrow
From	Date of action	R	Enter the last date of work. The day **after** this date will appear on the next infotype screen.
Select action type	Type of action that is to be performed	R	Select the Option B Resignation tab.

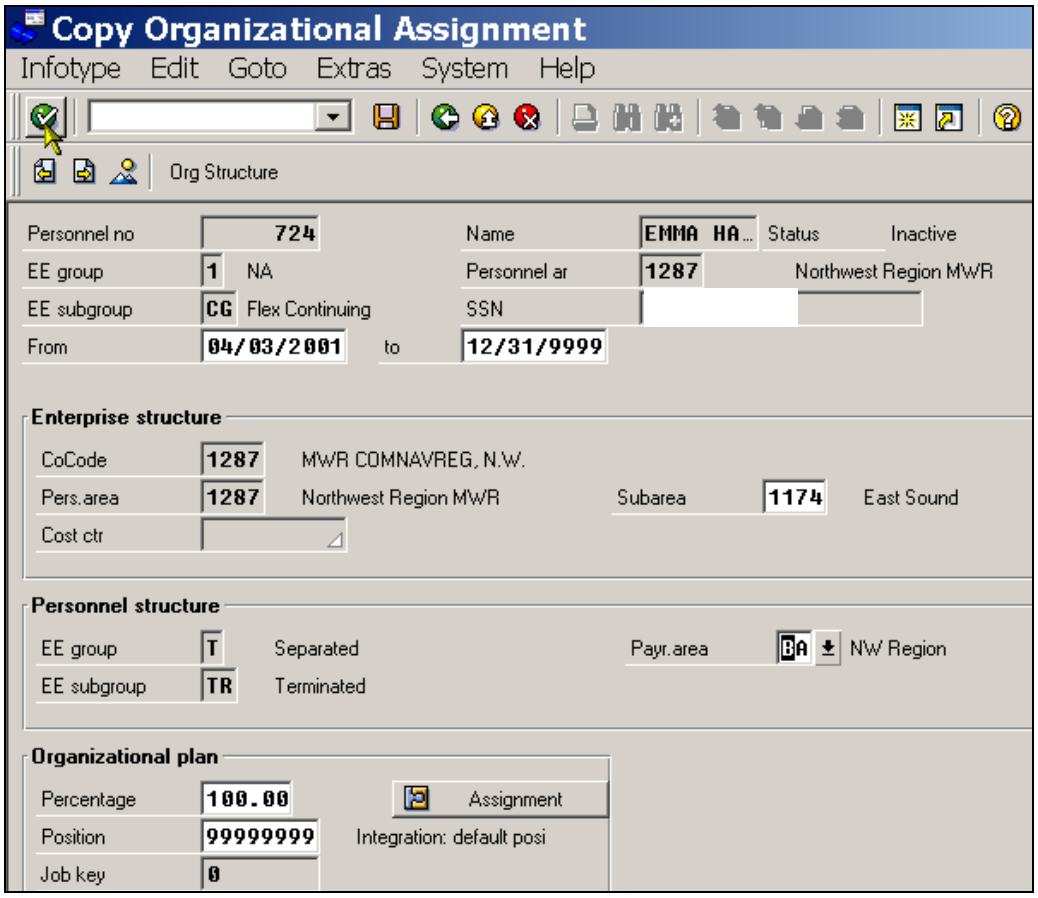
Infotype 0000: Copy Actions



Field Name	Description	R/O/C	User Action and Values
Action Type	Separation	R	No entry required
Reason for Action	The reason for the action	R	You can use the drop down and select the reason
Employment	System default	R	This field will default in **Withdrawn** status
Position	User defined	R	Change to "99999999"
Personnel Area	The assigned area of the position within the organization	R	This field will default in
Employee Group	The assigned group of employees the employee will be assigned to	R	This field will default in. **You MUST change the EE Group to "T"- Separated.**
Employee Subgroup	The assigned subgroup for the employee	R	This field will default in. **You MUST change the EE Subgroup to "TR" – Terminated.**

Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to save your entries.

Press the Save icon . You will now see the next infotype in the separation action series the Infotype 0001 – Copy Organizational Assignment.

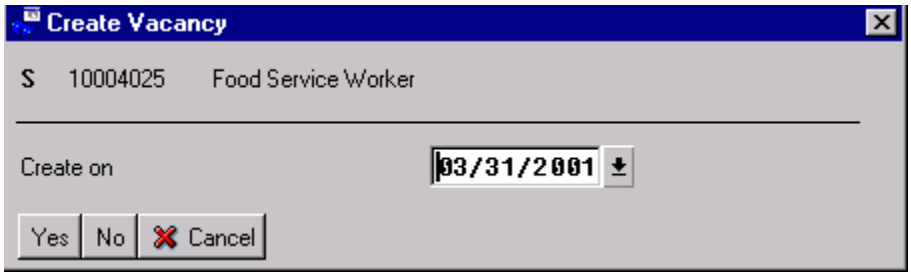


Field Name	Description	R/O/C	User Action and Values
Co Code	Company Code	R	This field will default in.
Pers Area	Personnel Area	R	This field will default in.
Cost Ctr	Cost Center	R	This field will default blank
Subarea	Personnel Subarea	R	This field will default in.
EE Group	Employee Group	R	This field will default in.
EE Subgroup	Employee Subgroup	R	This field will default in.
Payr Area	Payroll Area	R	This field will default in.
Percentage	Percentage assigned	R	Must blank out
Position	Position number	R	This field will default in

			999999.
Job Key	Job key	R	This field will default in.
Exempt	Exempt status	R	This field will default in.
Org Unit	Organization unit assigned	R	This field will default in.
Org Key	Organization key assigned	R	This field will default in.

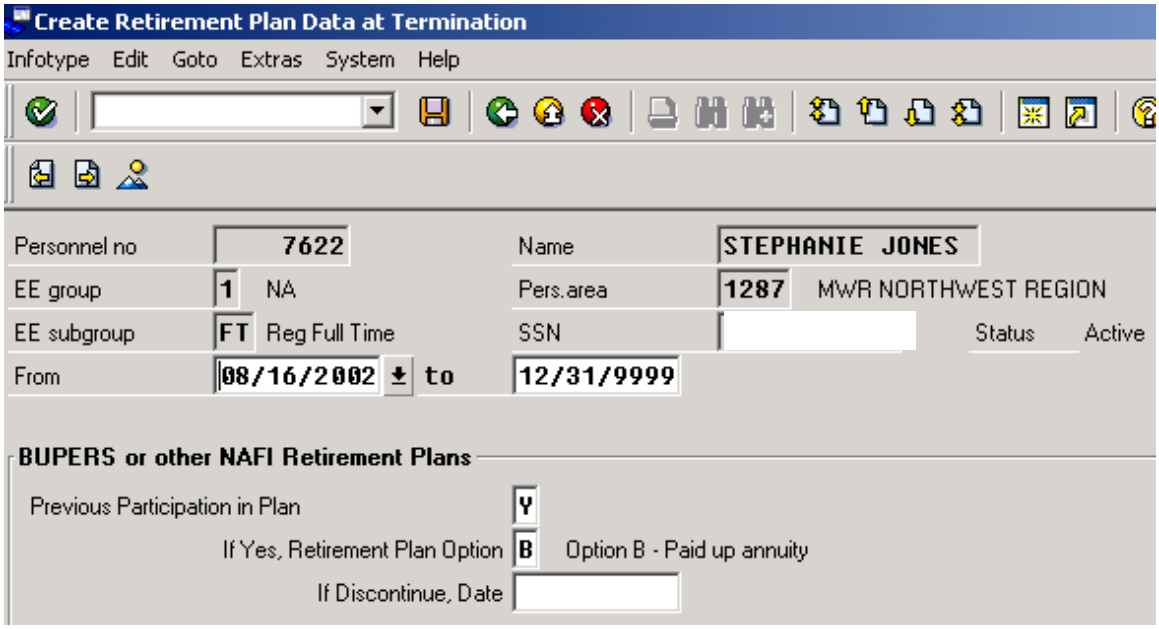
Press the Enter icon . You will get the Record Delimited warning message. Press the Enter icon again. You will be warned to save your entries.

Press the Save icon . The "Create Vacancy" box will appear. Select the "yes" option. **The system defaults to today's date. You must change it to the date of termination.**



You will now see the next infotype in the retirement action series the Infotype 0001 – Retirement Plan Data at Termination.

Infotype 9001 - Create Retirement Plan Data at Termination

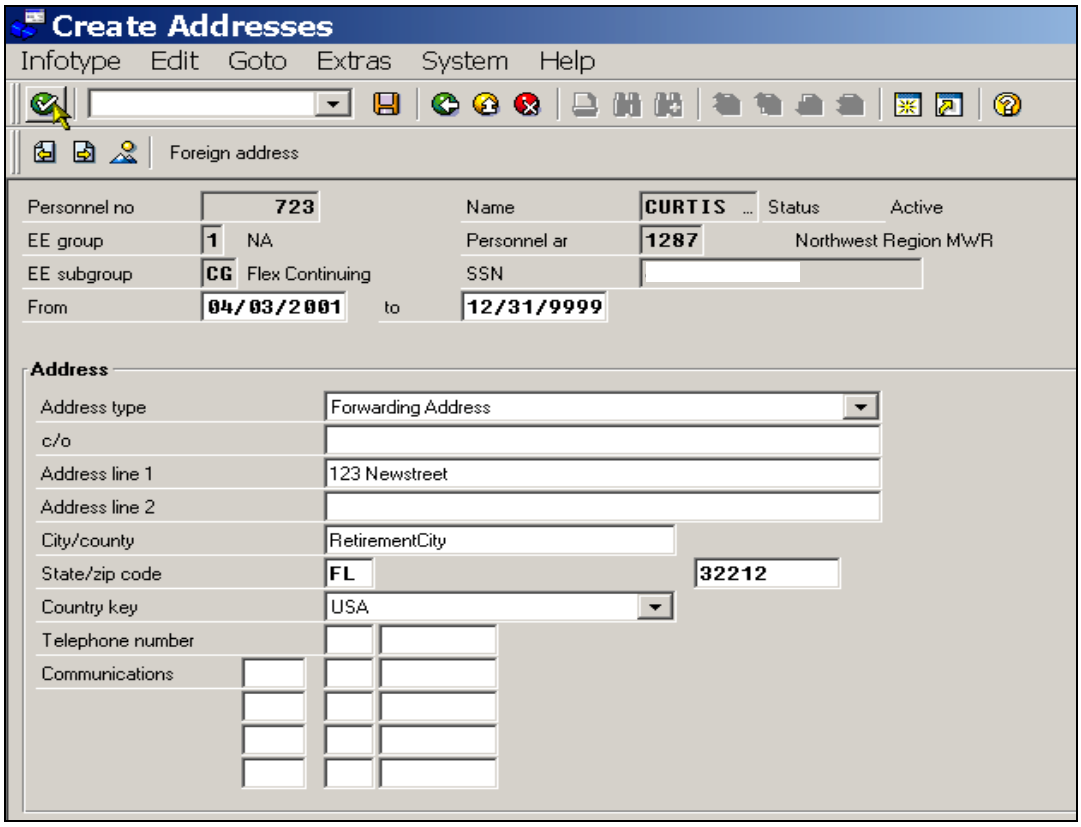


Field Name	Description	R/O/C	User Action and Values
From	Date of Termination	R	The system enters the date of the termination. Leave the end date as 12-31-9999
Previous Participation in Plan	Y for previous plans N for no previous plans	R	Select Y if previous plan exists or use the drop down arrow
If Yes, Retirement Plan Option		R	Use drop down to select option
If Discontinue Date		R	Must be blank for this termination

Press the Enter icon and Save.

You will now see the next infotype in the retirement action series the Infotype 0006 – Create Addresses, Subtype Forwarding Address.

Infotype 0006: Create Addresses



Field Name	Description	R/O/C	User Action and Values
Address Type	Type of address	R	This field will default **Forwarding Address**
C/O	In care of	O	This field may default in if a record already exists. If no data defaults, you may enter the c/o person's name.
Address	Street name and number	R	This field may default in if a record already exists. If no data defaults, you may enter the street address.
City	City	R	This field may default in if a record already exists. If no data defaults, you may enter the city.
State/Zip Code	State/zip code	R	This field may default in if a record already exists. If no data defaults, you may enter the state.

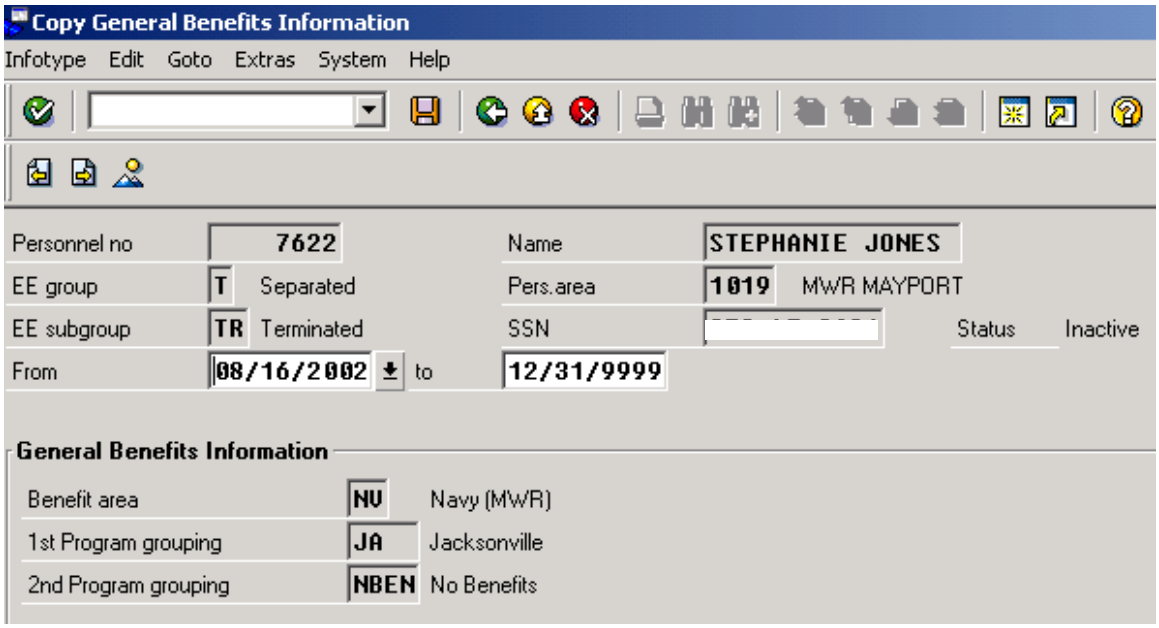
Country Key	Country	R	This field will default US. You may change if needed.
Telephone Number	Telephone	O	This field may default in if a record already exists. If no data defaults, you may enter the telephone number.
Communications	User defined	O	This field may default in if a record already exists. If no data defaults, you may enter additional contact numbers.

Select the Enter icon . You will be warned to save your entries.

Press the Save icon .

You will now see the infotype 0171 – Copy General Benefits Information.

Infotype 0171 – Copy General Benefits Information



Press the Save icon . You will get the Record Delimited warning message.

Select the Enter icon . You will get the message "record created."

Process a Leave of Absence (LWOP)

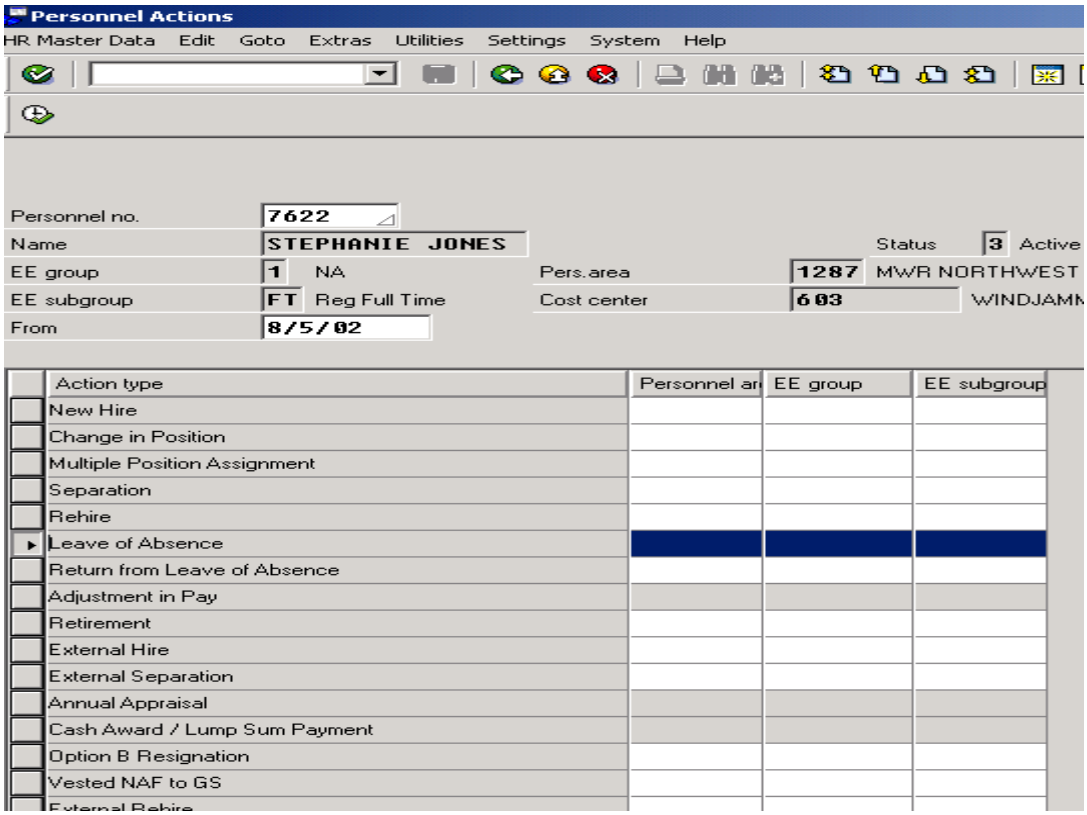
This process is only used when an employee is out of work without pay. This is a non-pay status and therefore when the employee is in this status, there is no accumulation of either sick or annual leave. This status is usually set due to the employee's request. See the policy manuals for further explanation of this process.

This action uses the copy mode for several infotypes. It is important that the user remembers that information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

After you have entered your changes to an infotype and used the enter key, you should receive a warning message telling you that a previous entry has been delimited. This warning verifies that you actually want to make the change and that you have changed the "From date" to reflect that your record will now be the current one. You may proceed through the message by using the Enter key again and you will then be reminded to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

Transaction Code: **PA40**

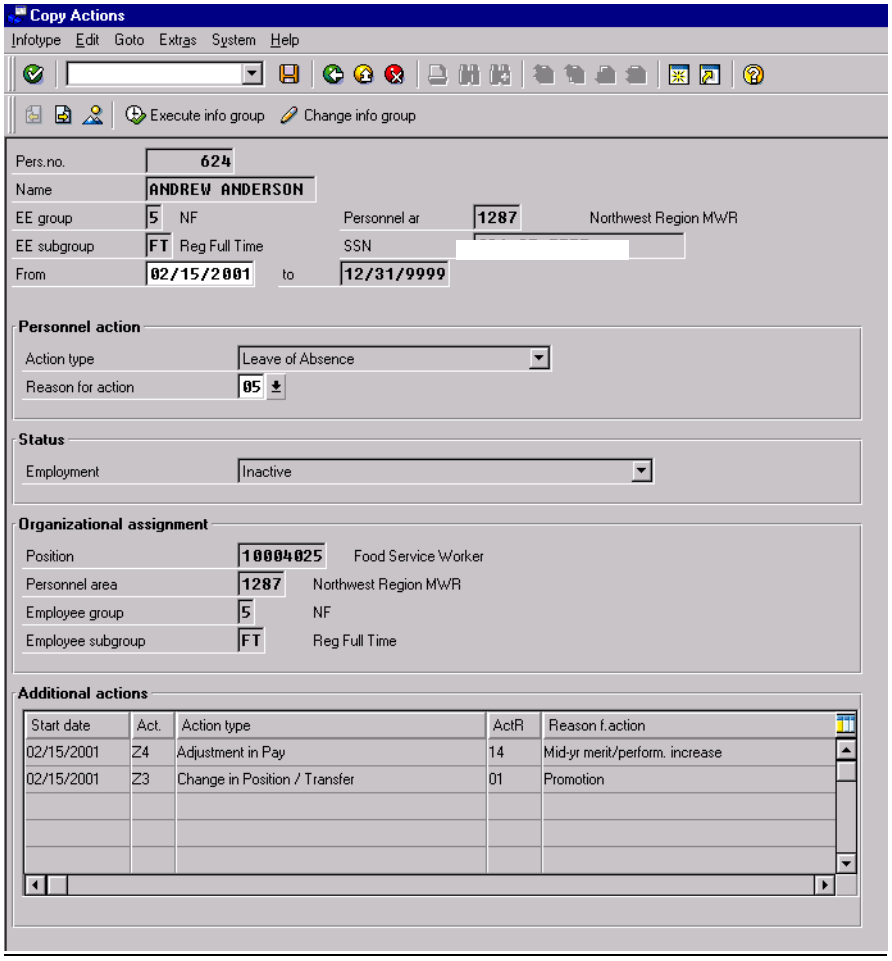


Field Name	Description	R/O/C	User Action/Value
From date	The date the Leave of absence is to start	R	Enter the effective date of the action
Personnel Number	Employee Number	R	Enter the number or use the dropdown menu to select the correct employee
Action type	The type of action to be performed	R	Select the Leave of Absence action

Select the Execute icon

Save the transaction by clicking the icon

The result is that infotype 0000 – Copy Actions will appear.

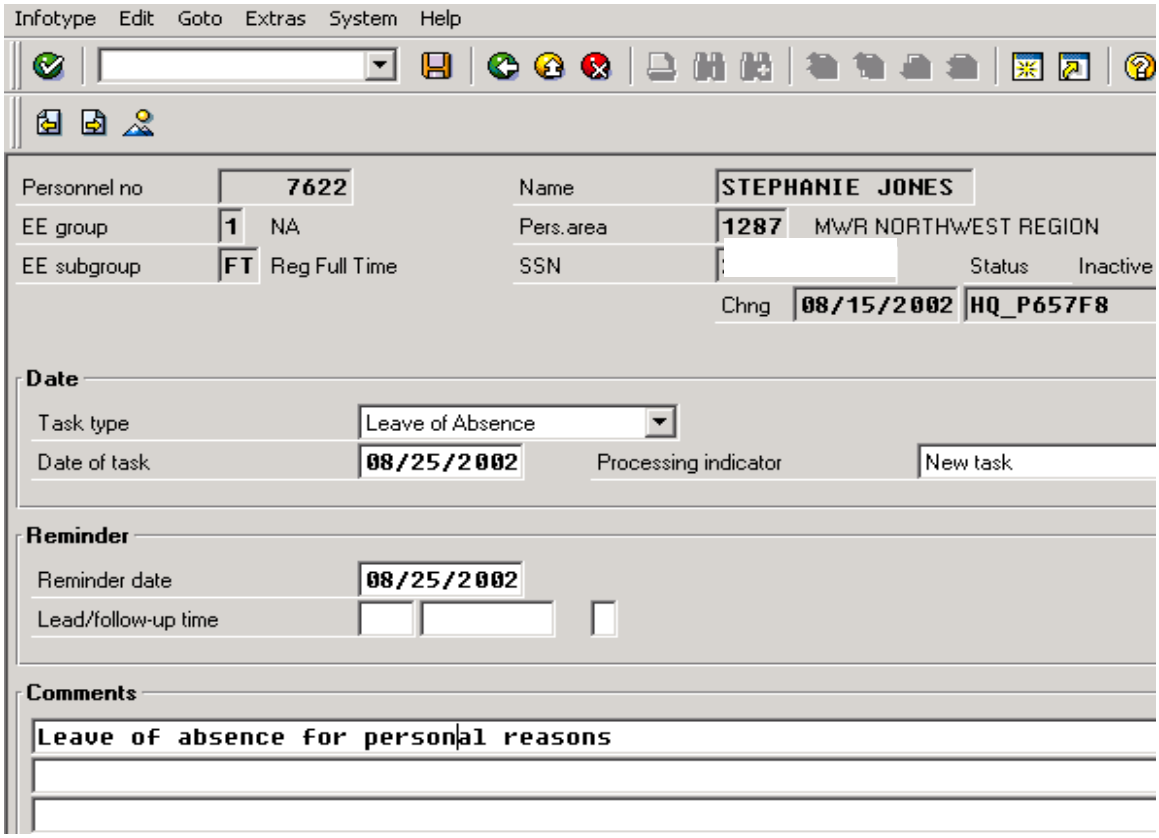


Field Name	Description	R/O/C	User Action/Values	Comments
Action Type	Leave of Absence	R	This will default in	
Reason for action	The reason for the action being performed	R	You can use the dropdown menu to select the reason	**This is the Only Field requiring an entry**
Employment	Changed to inactive	R	This will default in	
Position	MWR Position	R	Will default the position number	
Personnel Area	The assigned area within the organization	R	The field populated from the previous record	
Employee Group	The assigned group the employee has been assigned to	R	The field populated from the previous record	
Employee Subgroup	The assigned subgroup for the employee	R	The field is populated from the previous record.	

Select the Enter icon .

Save the transaction by clicking the icon

The result is that infotype 0019 – Create Monitoring of Tasks will appear

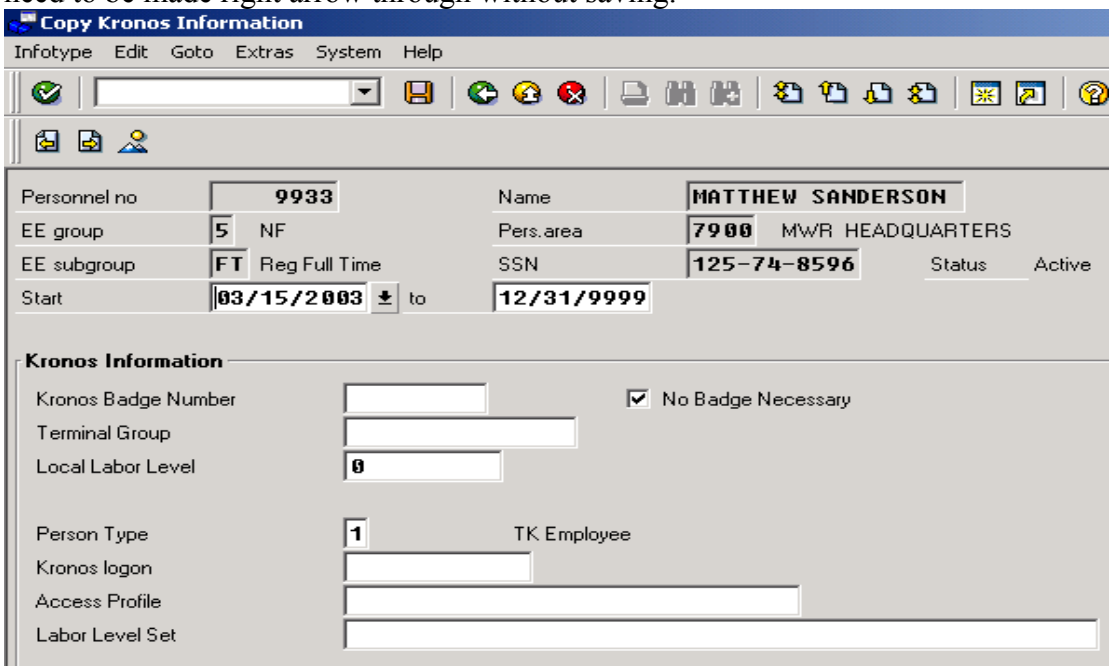


Field Name	Description	R/O/C	User Action/Values
Task Type	Type of task to be monitored	R	Defaults to Leave of Absence. Nothing required
Date	Date that the task will require action	R	Field is required if the task type was populated. **Enter the ted return date.**
Processing indicator	Status of task	R	Defaults as "New Task" No entry required.
Comments	Comments	O	Free text if comments need to be entered.

Select the Enter icon .

Save the transaction by clicking the icon

Screen will now roll to Copy Kronos Information. Change the effective date and change information as needed by following the instructions below and save. If changes do not need to be made right arrow through without saving.



Field Name	Description	R/O/C	User Actions/Values
Kronos badge Number	Kronos badge number	C	Blank out.
Kronos Terminal Group	Kronos Terminal number	C	Blank out.
Kronos Labor Level 3	Labor Level	C	Leave as defaulted.
Person Type	Person Type	C	Leave as defaulted.
Kronos Logon	Kronos Logon	C	Leave as defaulted.
Access Profile	Access Profile	C	Leave as defaulted.
Labor Level Set	Kronos Labor Level Set	C	Leave as defaulted.

Put a checkmark in the "No Badge Necessary" box.

Note: Employee must have either a Kronos badge number or have the No Kronos box checked.

Press the Enter button and Save the transaction.

Screen will roll back to the Personnel Action Screen and the Record will be created.

Process a Return from Leave of Absence

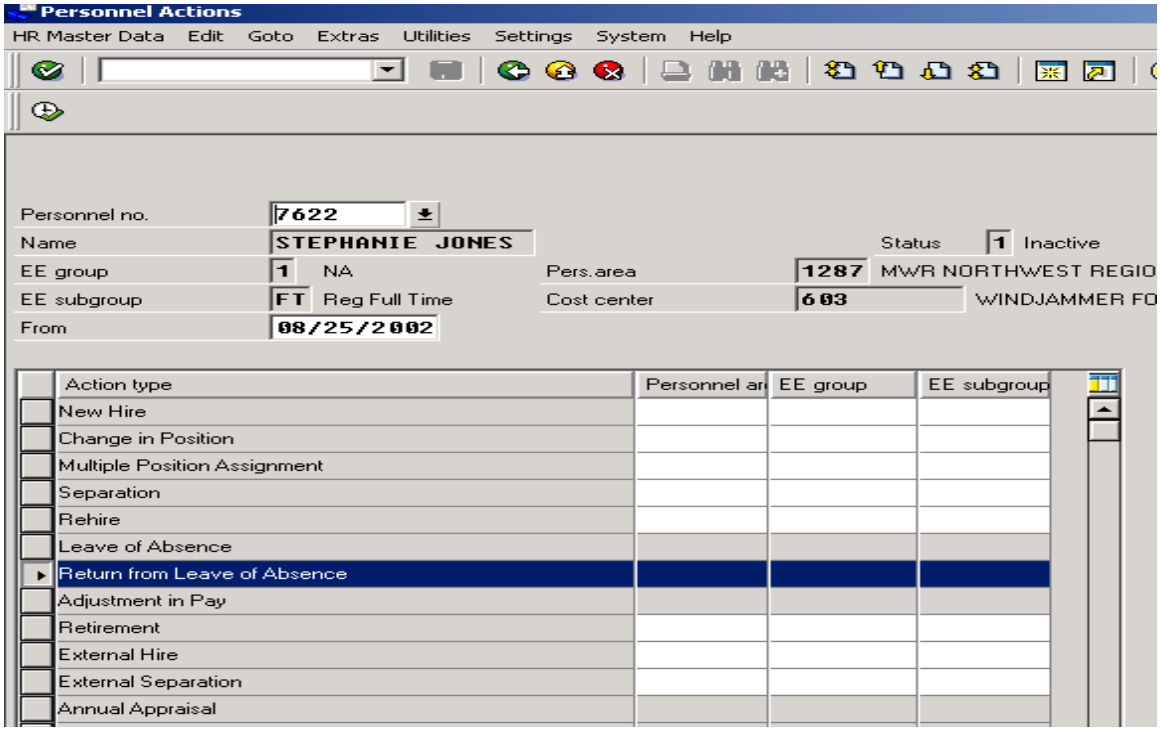
This procedure should be used to process a return from a Leave without Pay (A Leave of Absence).

- This process uses the copy mode for several infotypes. It is important that you remember the information that has defaulted in the fields pertains to a previous action and some fields may need to be changed to reflect the current action.

- After you have entered your changes to an infotype and used the enter key, you should receive a message telling you that a previous entry will be delimited. This verifies that you want to make the change and that you have changed the From Date to reflect that your changed record will now be the current one. You will proceed through the message by using the Enter key and you will then be prompted to save your changes.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

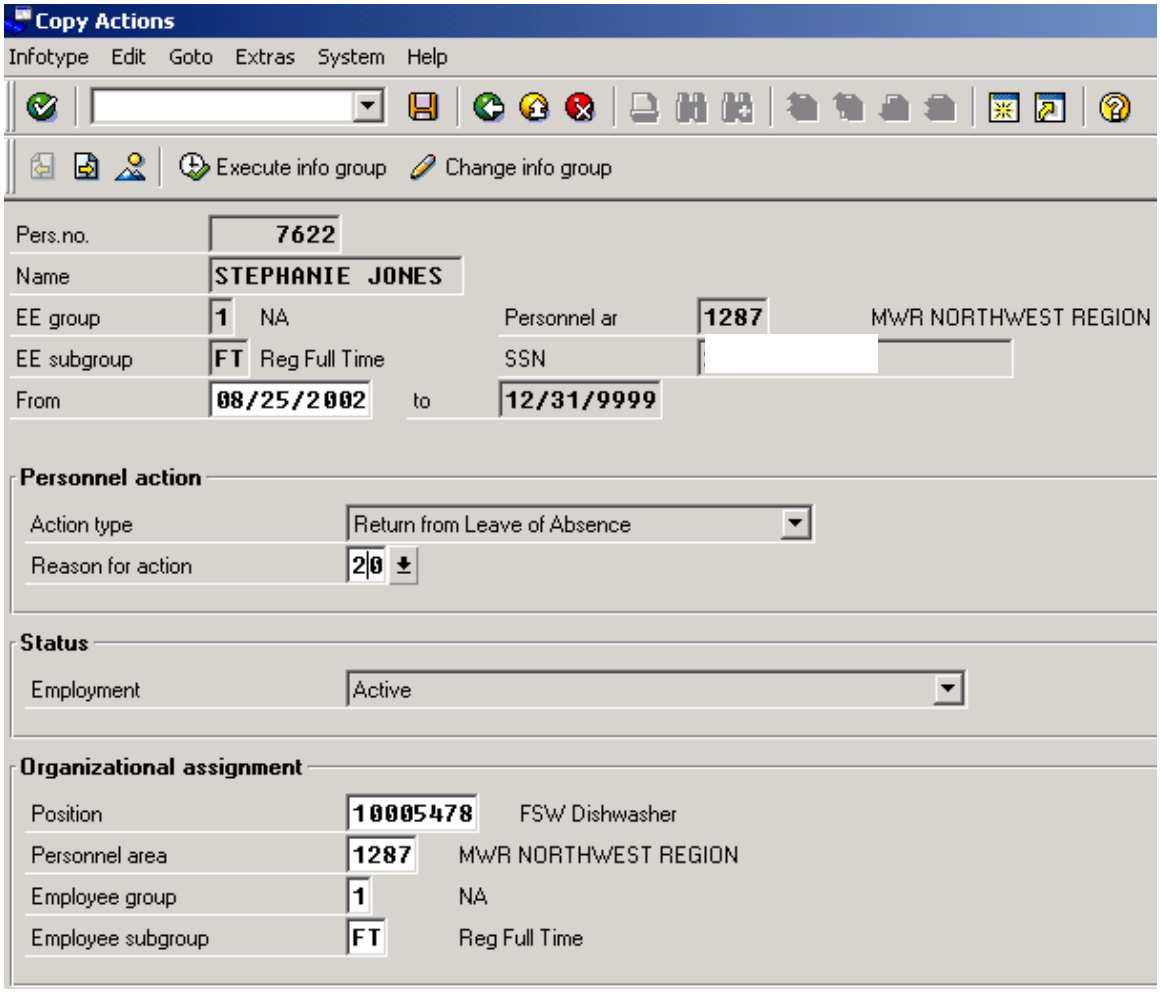
Transaction Code: **PA40**



We have selected Personnel Number 744 and highlighted the **Return from Leave of Absence** action type.

Select the Execute icon

The next infotype will be Copy Actions

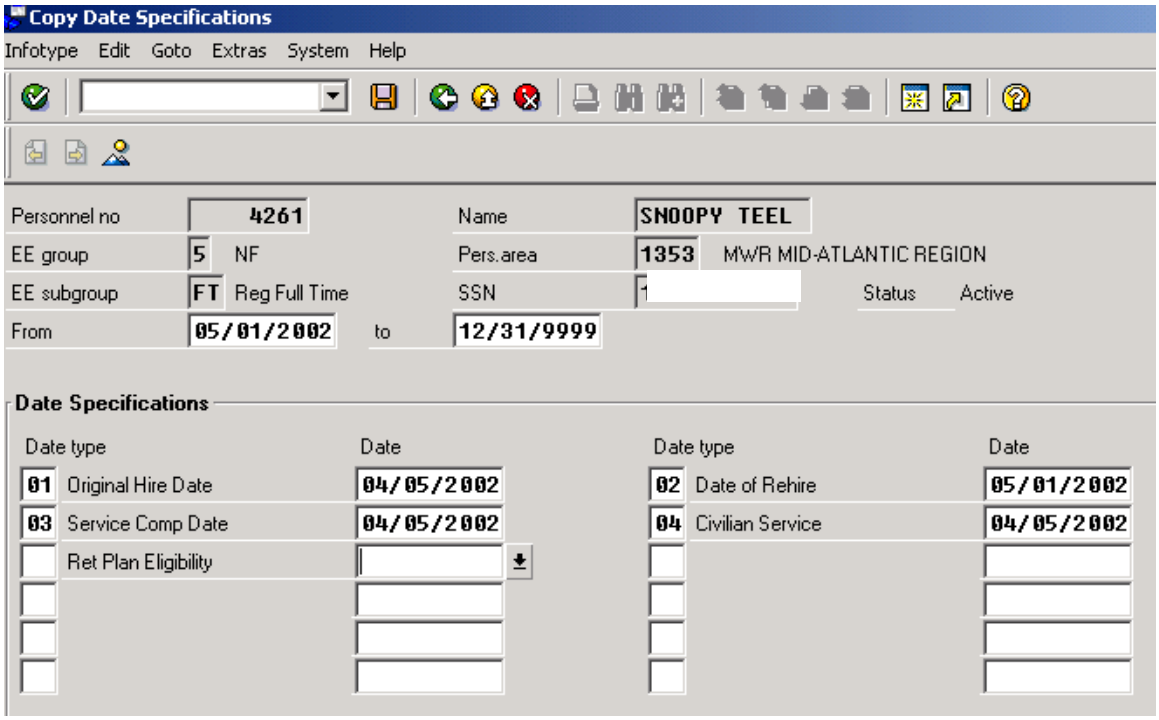


Field Name	Description	R/O/C	User Action/Values
Action type	Return from Leave of Absence	R	Will default in
Reason for Action	The reason the action is being performed	R	Use the drop down arrow to select the reason. **This is the only field that requires an entry**.
Employment	User defined	R	Will default in
Position	User defined	R	Will default in
Personnel Area	User defined	R	Will default in
Employee Group	The group that the employee is assigned to.	R	Will default in
Employee subgroup	The assigned subgroup for the employee	R	Will default in

Press the Enter button . A message "W: Record valid date to date will be delimited".

Press the Enter button again and save .

The next infotype appears Infotype 0041 – Copy Date Specifications

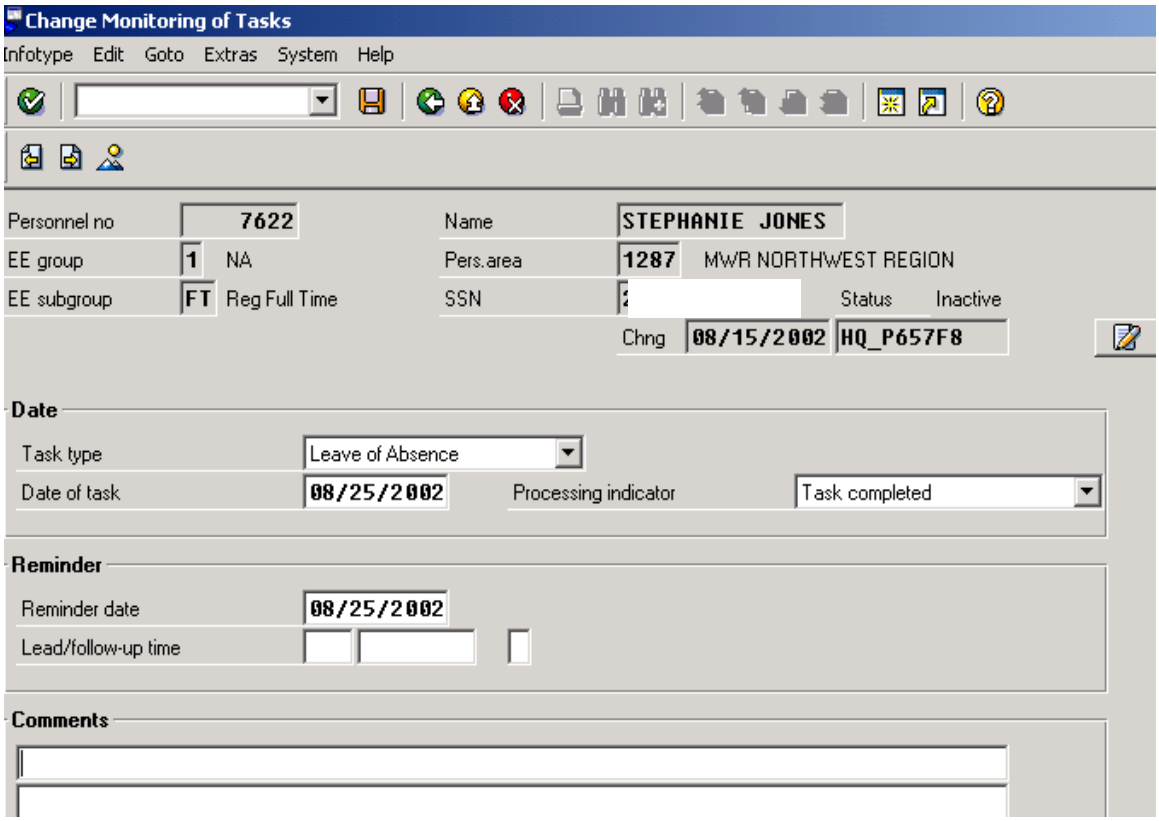


NOTE: This screen is only necessary if the Leave of Absence should change the Service computation date. If not move through the record screens using the next and previous record icons as shown. .

If any changes were made, Press the Enter button .

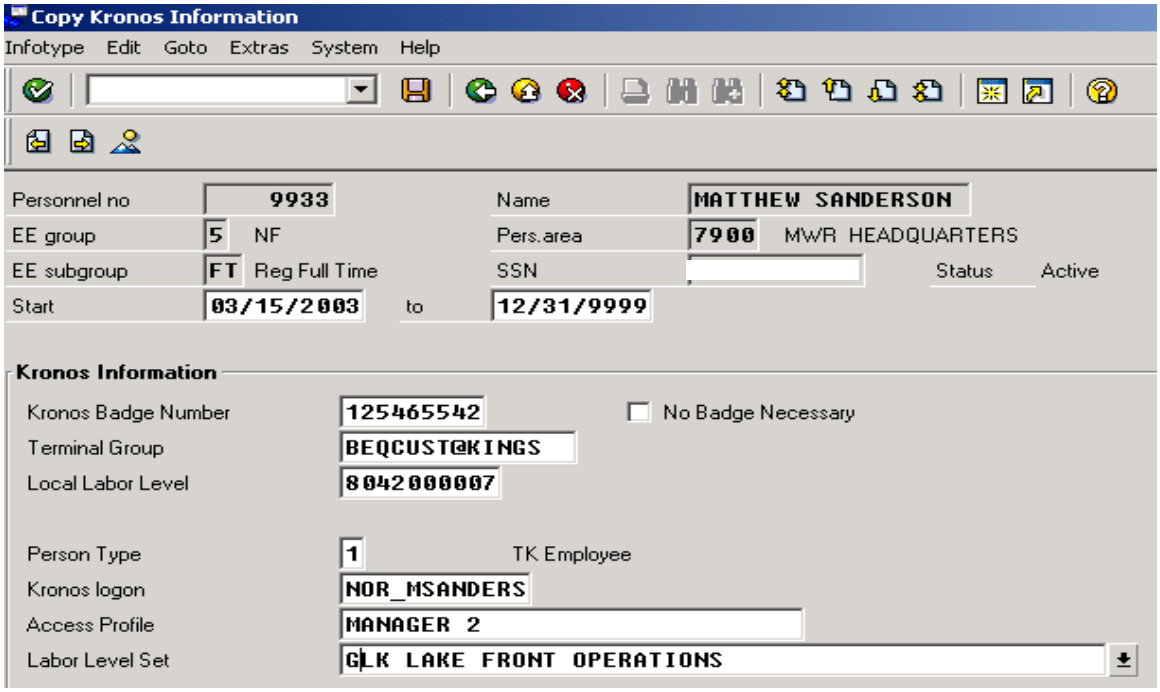
Save the transaction using the Save icon .

The screen rolls to infotype 0019 – Change Monitoring of Tasks



Field Name	Description	R/O/C	User Action/Values
Task Type	Type of task to be monitored	R	Defaults as Leave of Absence.
Date	Date that the task will required action	R	Defaults as the date entered in the Leave action (the expected date of return) **No entry required**.
Processing indicator	Status of task	R	From drop down arrow, select **Task completed**.
Comments	Comments	O	Free text for any comments.

Screen will now roll to Copy Kronos Information. Change the effective date and change information as needed by following the instructions below and save.



Field Name	Description	R/O/C	User Actions/Values
Kronos badge Number	Kronos badge number	C	Enter the Kronos badge number.
Kronos Terminal Group	Kronos Terminal number	C	Enter the Terminal Group from the dropdown menu.
Kronos Labor Level 3	Labor Level	C	Actual work site name used for VQ only. Select from the dropdown.
Person Type	Person Type	C	Enter the Person Type from the dropdown menu.
Kronos Logon	Kronos Logon	C	Leave as defaulted.
Access Profile	Access Profile	C	Enter the employee's profile from the dropdown.
Labor Level Set	Kronos Labor Level Set	C	Only used for managers to tell Kronos which group of employees the manager will administer. Select form the dropdown.

Note: Employee must have either a Kronos badge number or have the No Kronos box checked.

Press the Enter button and Save the transaction.

Screen will roll back to the Personnel Action Screen and the Record will be created.

Process an Activity Transfer

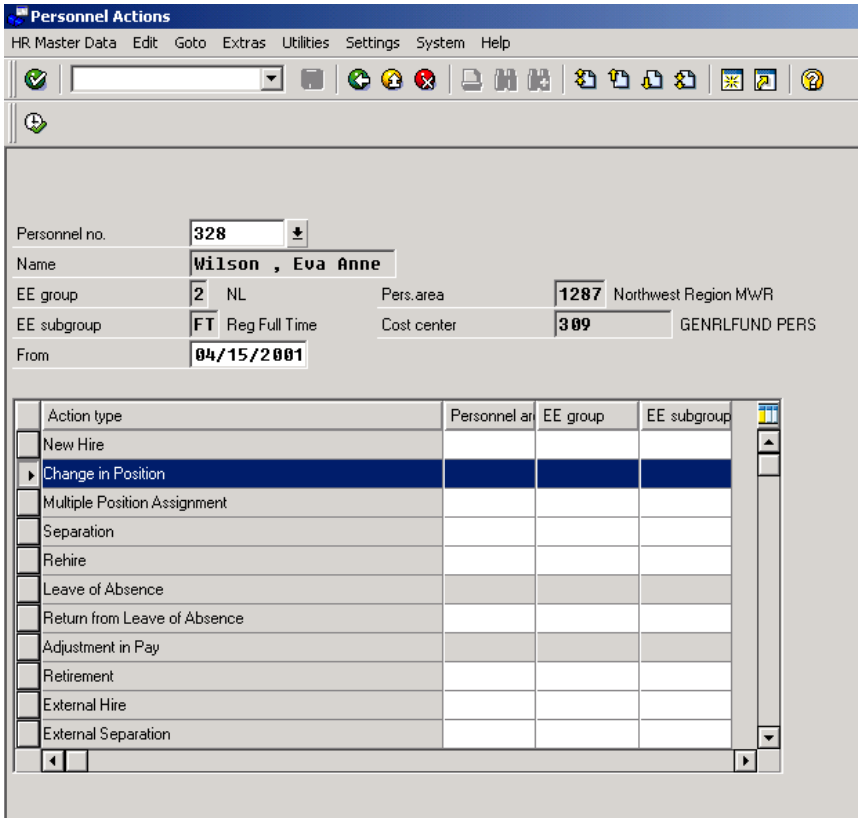
NOTE: The person who is to process the Activity transfer must contact Headquarters' SAP HR Team to be able to log into the application using Transaction code PA40. Please contact Headquarters' SAP HR Team.

When an employee transfers from one activity to another, the process requires a Change in Position Action. The acquiring location must initiate this action. The Change in Position action must be effective the first day of the pay period.

Menu Path: **HUMAN RESOURCES > PERSONNEL MANAGEMENT > ADMINISTRATION > HR MASTER DATA > PERSONNEL ACTIONS**

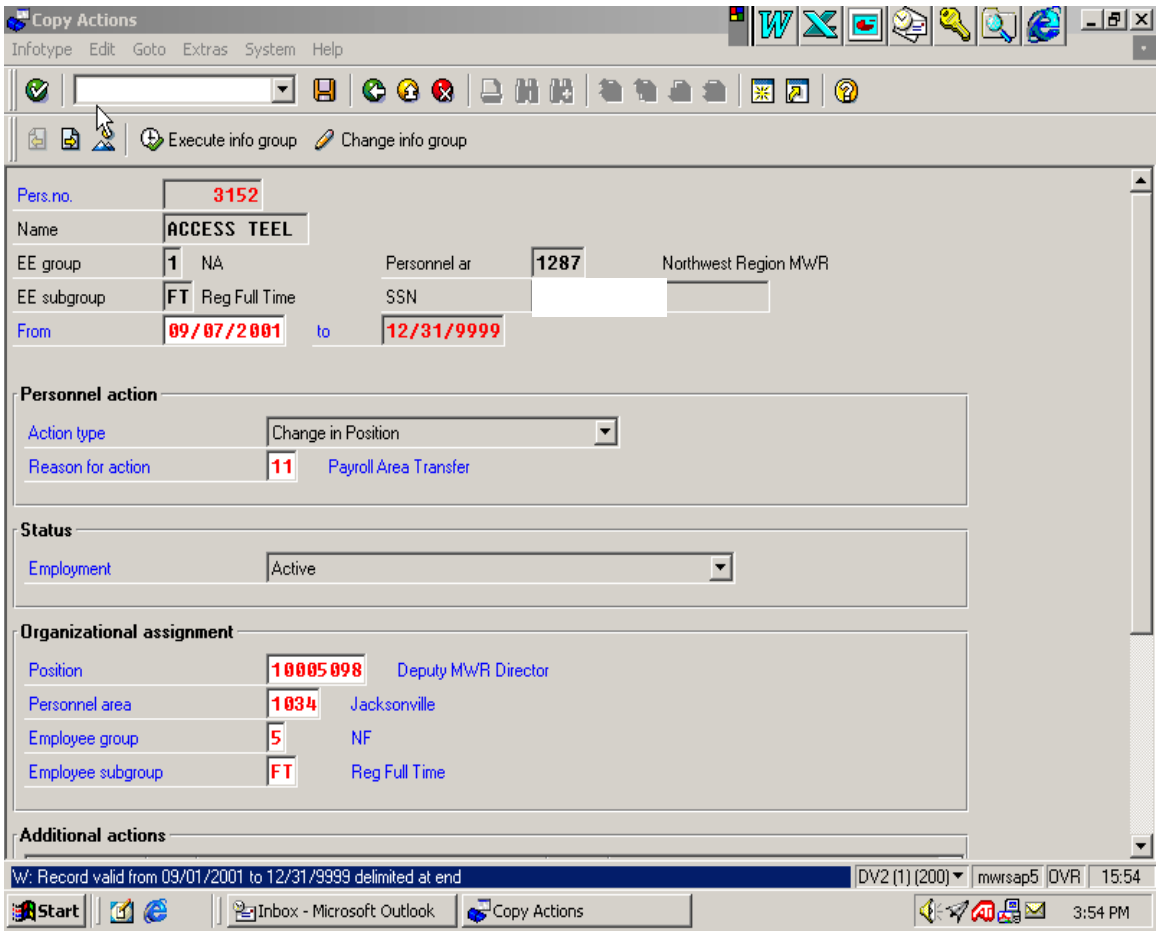
Transaction code: **PA40**

This procedure describes the steps necessary to process an activity transfer through the SAP Human Resources system. We have highlighted the Change in Position/Transfer line in the Action type section on the Personnel Actions screen and we now click the Execute icon. .



Field Name	Description	R/O/C	User Action/Values/Comments
Action type	Action type	R	Will default "**Change in Position**"
Reason for Action	The reason why the action is being taken	R	**Must enter the reason "11" Payroll Area Transfer.**
Employment	In the Status section	R	Will default to Active and it is not available for editing
Position	The current position number	R	Enter the new position number either directly, if known or use the drop down arrow to aid in the selection.
Personnel Area	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Group	Will default from the previous position. **Blank it Out!**	R	Will default in the new Personnel Area upon pressing the Enter key after fields have been blanked out.
Employee Subgroup	Will default from the previous position. **Blank it Out!**	R	Blank out the information from the previous position .Use the drop down arrow to aid in selecting the correct employee subgroup.

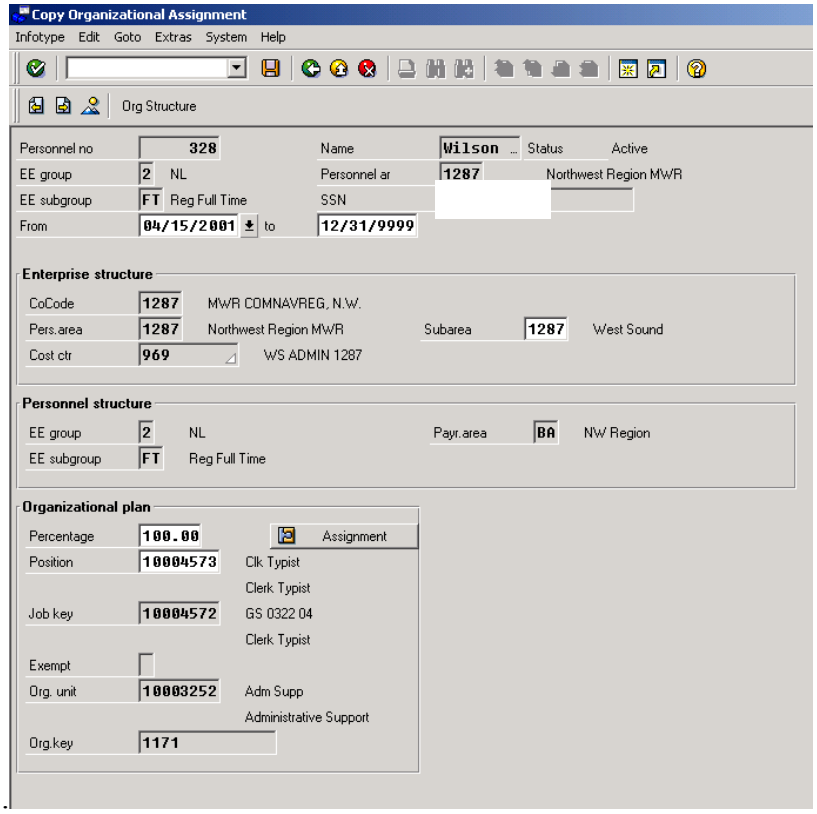
Screen: Copy Actions



NOTE: After striking the Enter key or clicking the green check mark, you will receive a message stating **"W: Previous record will be delimited "**, i.e., the end date of the last action will now be populated with the "From date" of the new action. This message appears on each infotype.

Press the Enter key or click the green checkmark icon to validate the record and then save it by clicking the Save icon. .

Infotype 0001 – Copy Organizational Assignment:

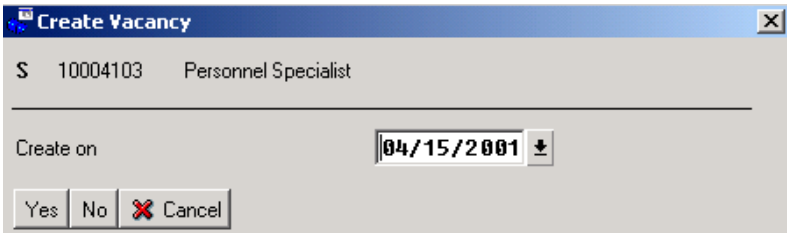


No Entry is required for this infotype.

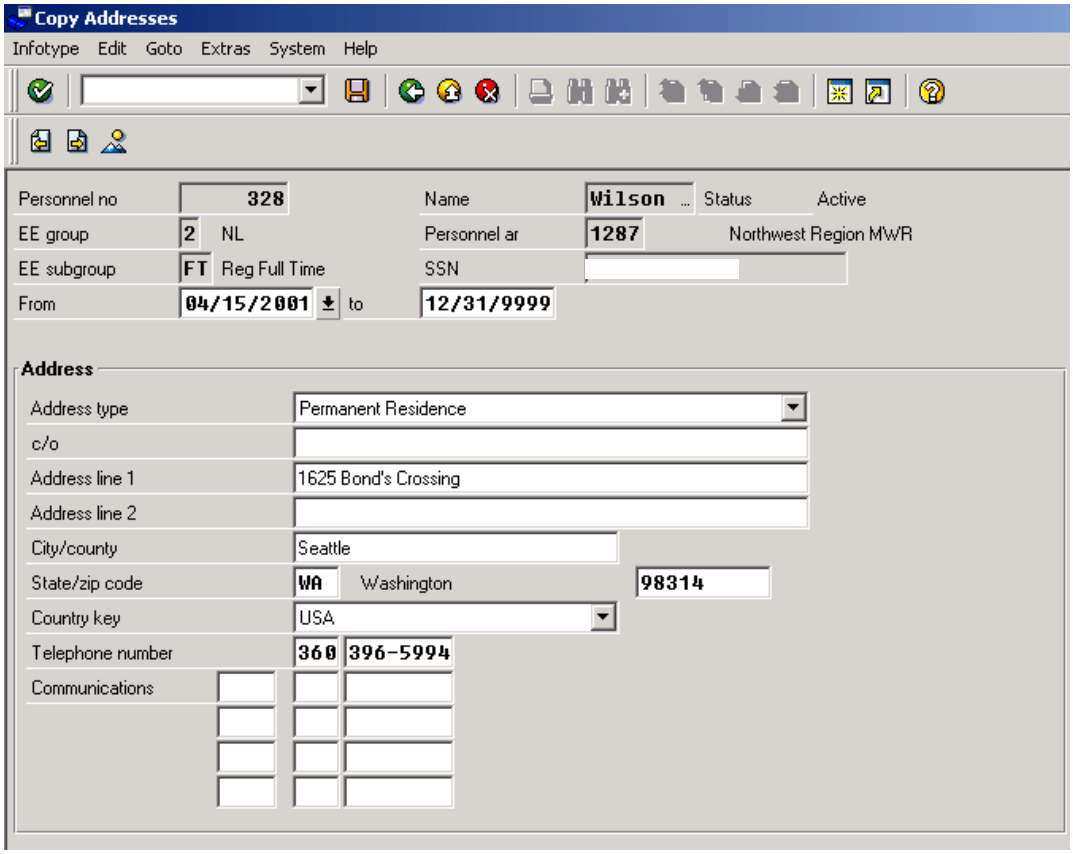
Press the Enter button or the green checkmark to validate the entries. Save the Record.

"W: Previous record will be delimited", (i.e., the end date of the last action will now be populated with the From date of the new action).

During the normal flow of this process, a pop-up window will appear to create a vacancy for the employee's previous position. Click on the "**Yes"** button on this window. **The date must be changed to the date of the action.** Today's date will default in, so if the date of action is different from today's date, you must change it.



Infotype 0006- Copy Addresses

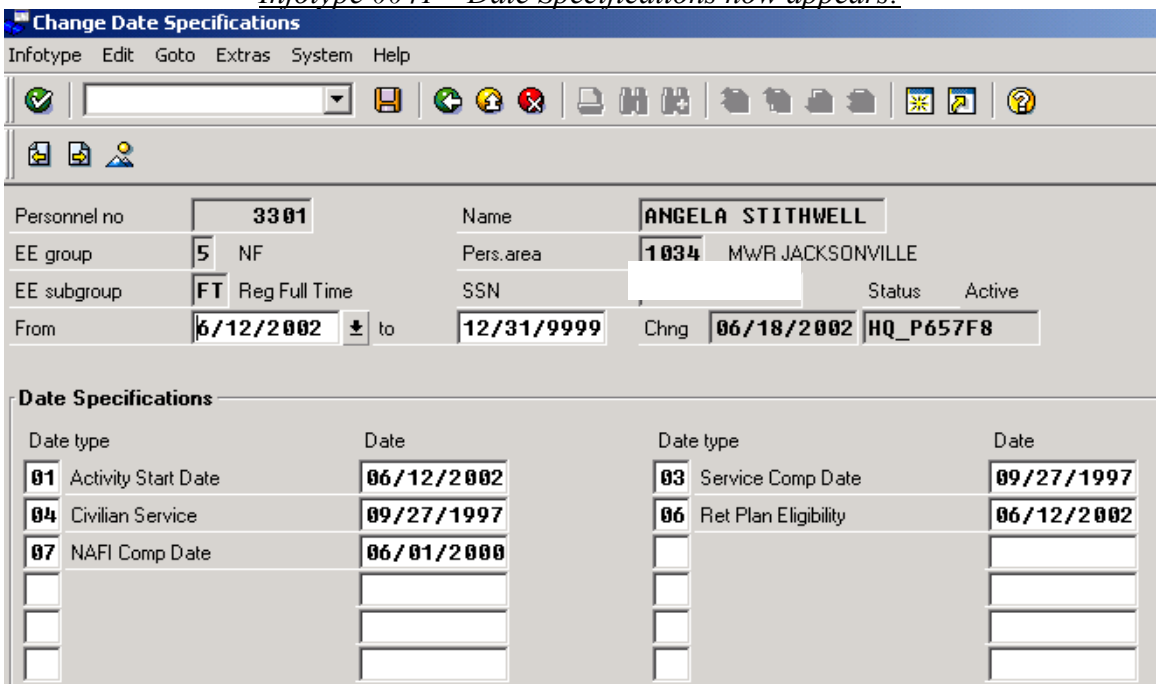


NOTE: Even if the employee's address does not change, you must copy this record with the position change date and save. All the applicable tax screens will now appear for completion. You must complete each tax infotype again and save.

Each record must be saved with the new date in order to populate the new company code in ADP, during the position change action based on the activity transfer.

Press the Enter key or click the green checkmark icon to validate your entries. Save this record.

Infotype 0041 – Date Specifications now appears:

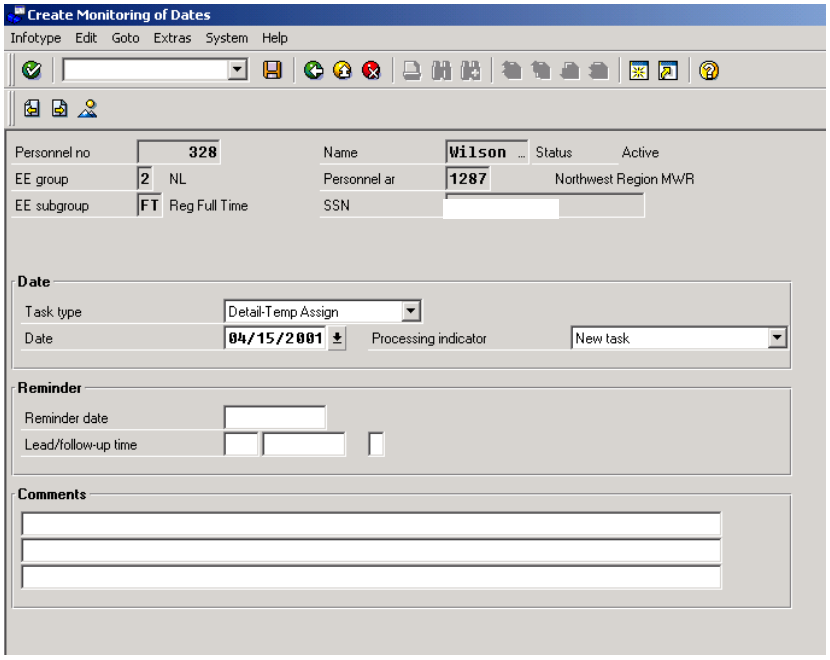


All fields will populate. Update as necessary.

Date type 01 ***Activity Start Date***, which is the first date of employment at the current activity. The date will need to be changed when an employee transfers to a new payroll area, i.e. Mayport to Seattle or MWR to VQ.
Date type 04 ***Civilian Service Date,*** which is the Service Computation Date minus the active duty military time. In most cases this will be the same as the Original hire date.
Date type 03 ***Service Computation Date***, the date either actual or constructed by crediting service, used to determine annual leave accrual. For an employee with no creditable NAFI or military service, the service comp date is the effective date of the employee's first Federal civilian appointment. For an employee with prior creditable service, the service comp date is constructed by totaling the days, months, and years of the employee's creditable civilian and military service and subtracting that total from the effective date of the employees most recent appointment. When service credit of 4 years, 3 months, and 3 days is subtracted from the date, 1998-10-12, the result is 1994-07-09. Thus, the service comp date will then be 07-09-1994.
Date type 06 ***Ret Plan Eligibility*** is used for benefit retirement plan eligibility. This date will populate from the new hire action. This date will require updating when an employee changes from a Flex position to a Regular Full Time position.
Date type 07 ***NAFI Computation Date***, the date either actual or constructed by crediting service, used to determine Regular NAFI employment length. For an employee with prior creditable service, The NAFI computation date is constructed by totaling the days, months, and years of the employee's creditable Regular NAFI service and subtracting that total from the employee's most recent appointment.

Press the Enter button and Save the transaction.

Infotype 0019 – Create Monitoring of Dates.



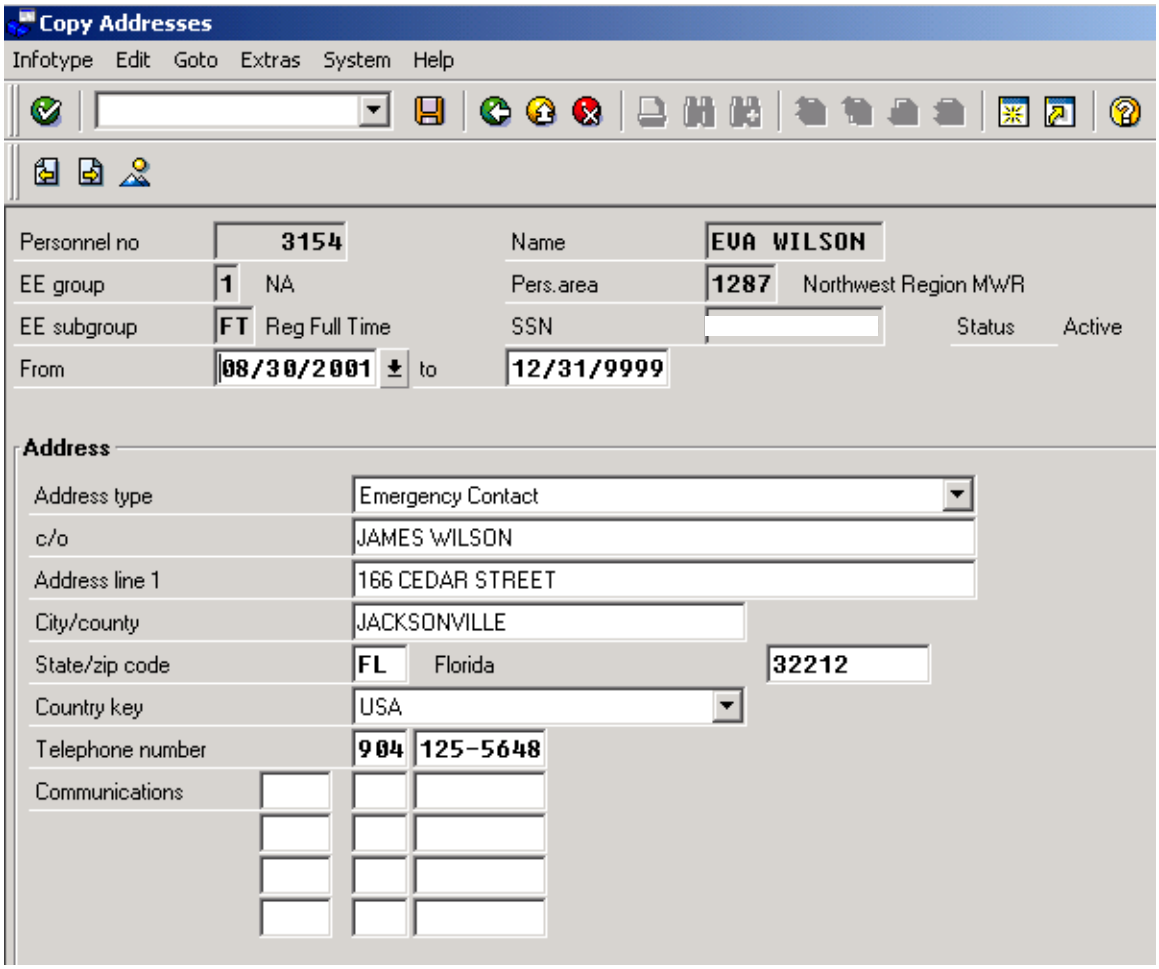
The fields in this infotype are self-explanatory and can be filled in directly or by using the drop down arrows to aid in the selection. In our example, the task type has been filled by using the drop down arrow and selecting "**Detail – Temp Assign"**. We have also entered the date the action becomes effective, and entered the processing indicator "**New task"**. We could also have used the Comments section to write in any free text remarks needed.

If more Date Monitoring is needed enter the information after the Change in Position action is complete. Use PA30, Infotype 0019 and click on the create tab. Enter the information and Save.

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

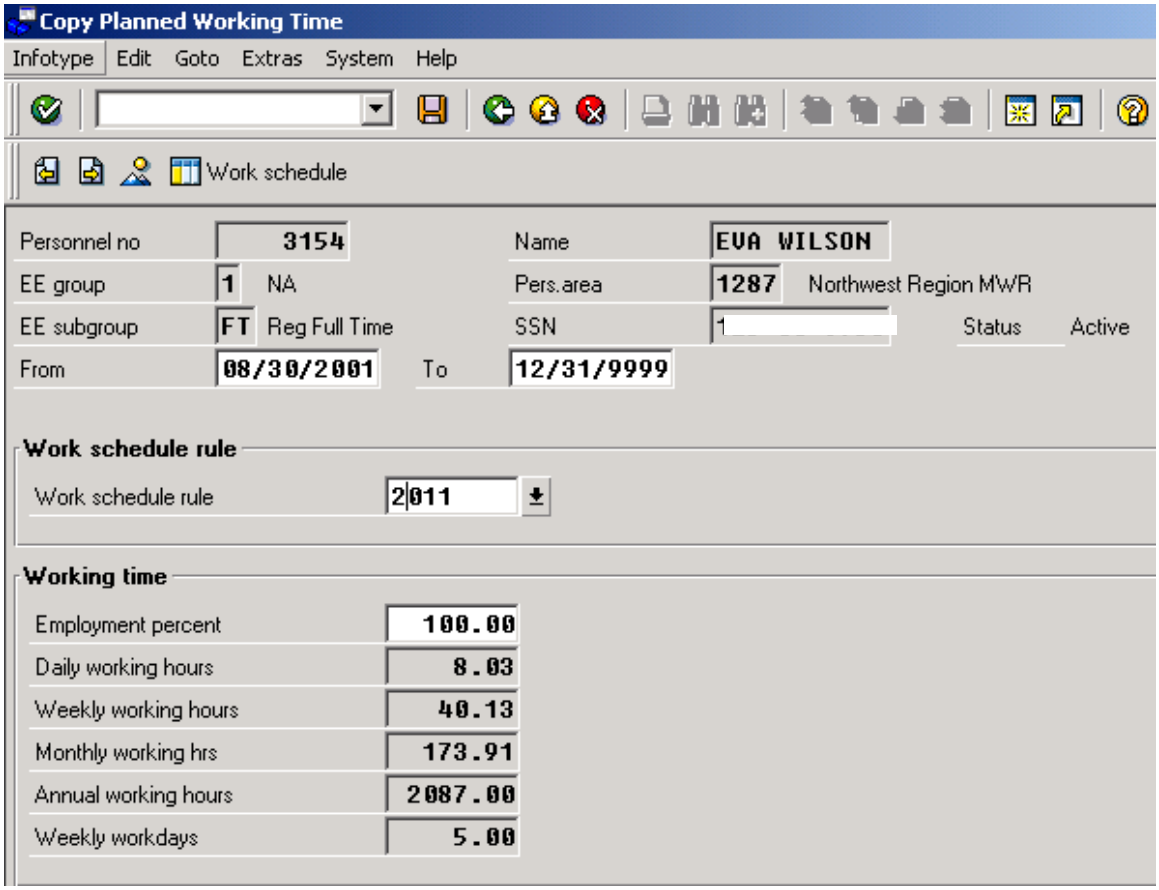
After saving the previous infotype the following one will appear:

Infotype 0006 – Addresses Emergency Contact



If information has not changed, just save. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

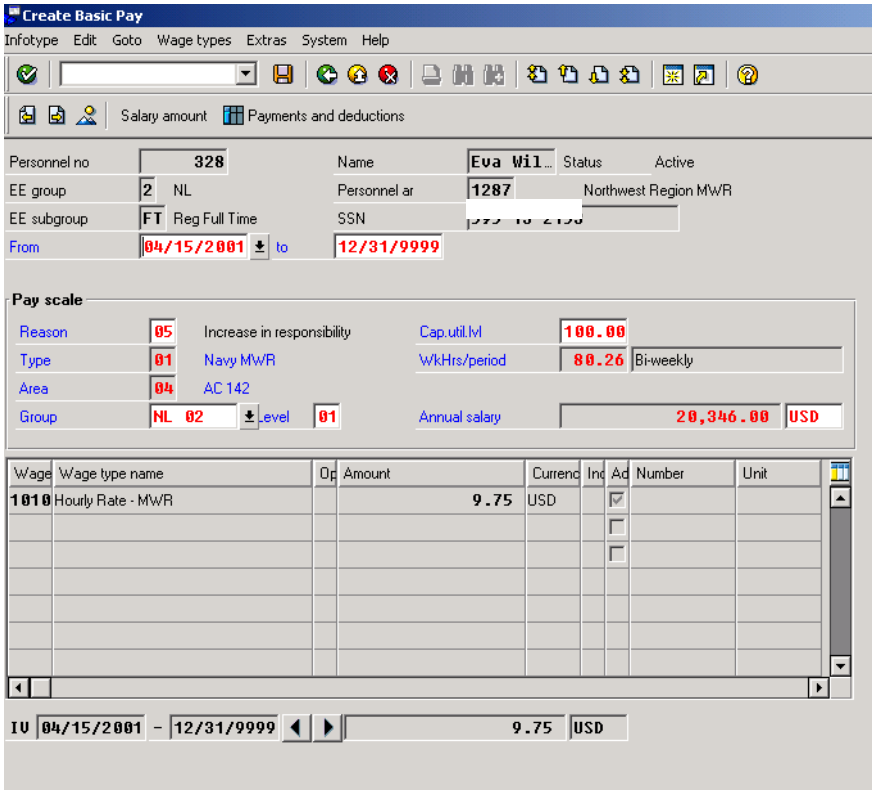
Infotype 0007 – Planned Working



Enter the new Work Schedule Rule for the employee. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

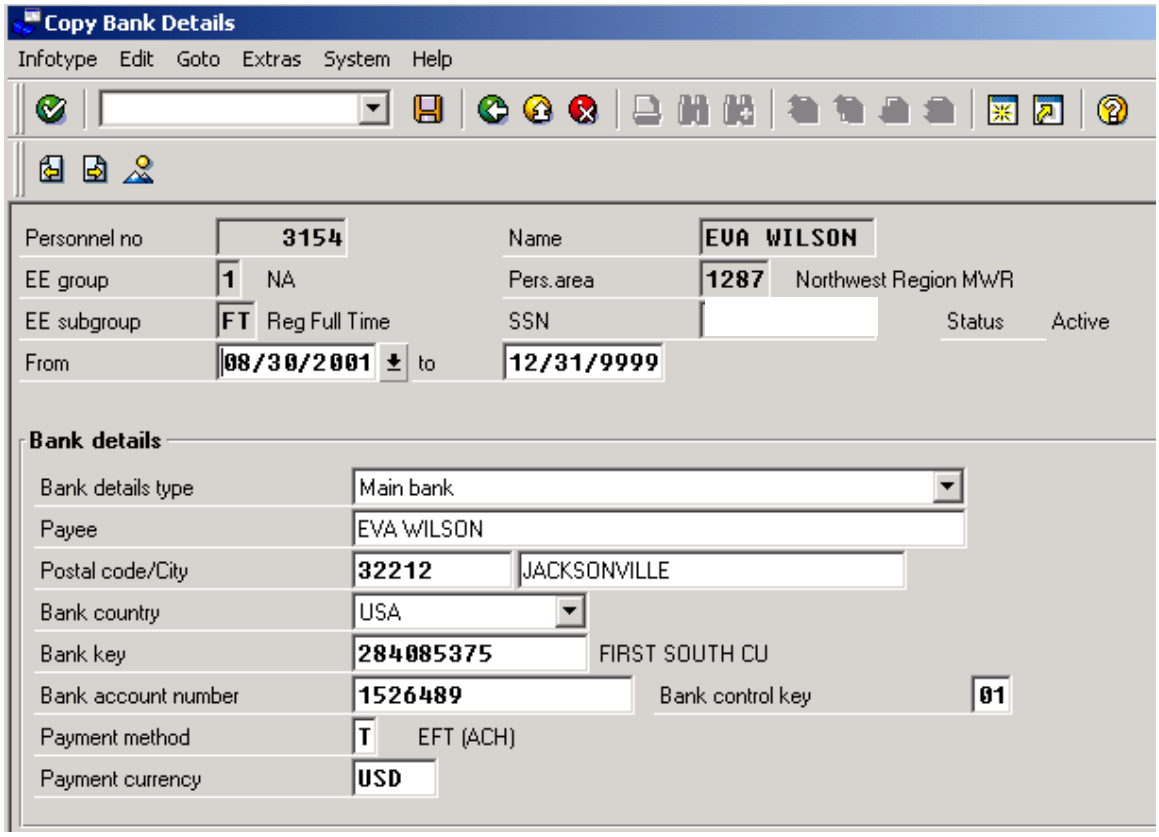
You will receive warning message to check the basic pay infotype 0008. Move through this warning message by pressing the Enter key and continue saving the new work schedule rule.

Infotype 0008 – Create Basic Pay



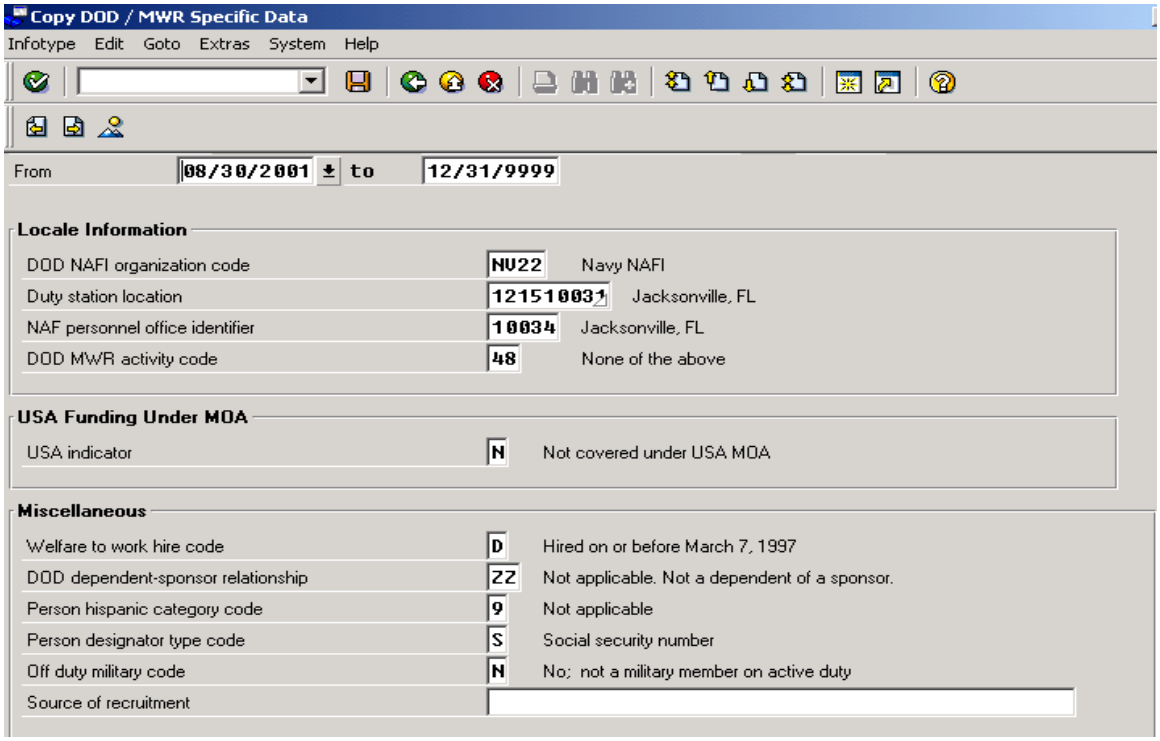
Enter any new basic pay information due to the position change of the employee. Press the Enter key or click the green checkmark icon to validate the record and then Save it.

Infotype 0009 – Copy Bank Details



Note: Even if the information does not change, you must save this record with the new date. The employee's record must be saved in order to populate ADP. This means the employee will be pre-noted for the first or second pay period in the new location.

Infotype 9001 – Copy DOD/MWR Specific Data



You must change all applicable information due to the position change (activity transfer).

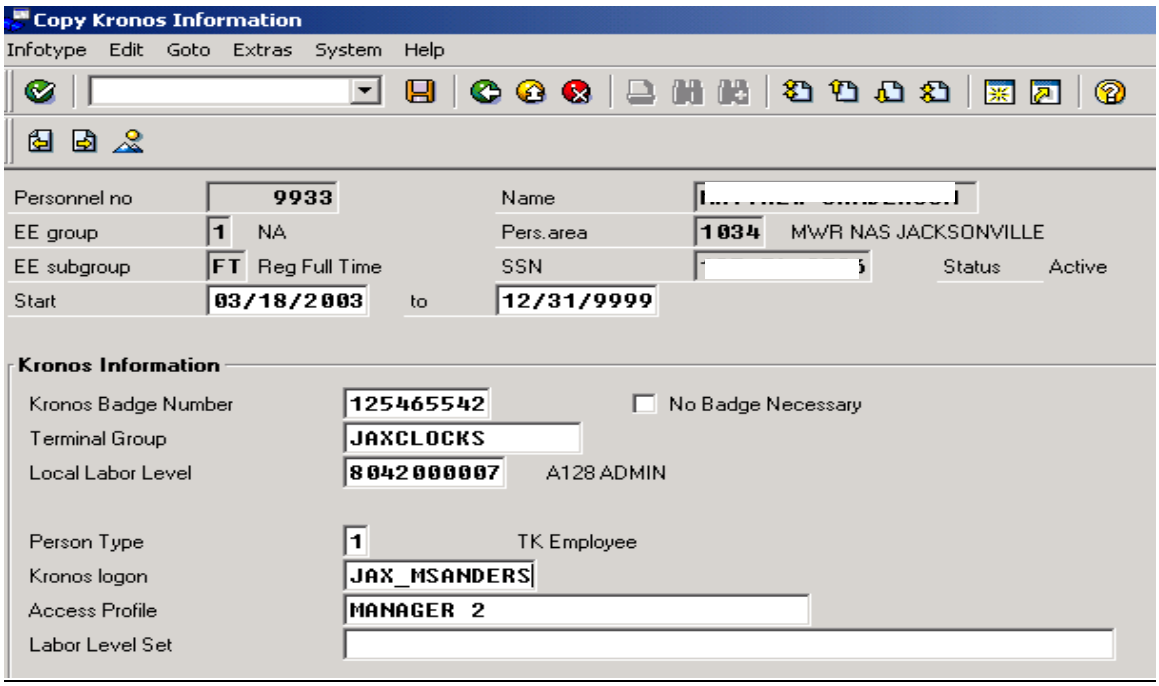
Note: The Duty Station Locator and the NAF Personnel Office Identifiers MUST be changed to accommodate the new activity.

The ADP Company Code and ADP File Number are "grayed" out and cannot be changed. The new information for these fields will be populated once the ADP file has been created in the new ADP Company code.

When complete save the transaction by clicking on the save icon .

The next infotype will be Kronos information-Infotype 9005.

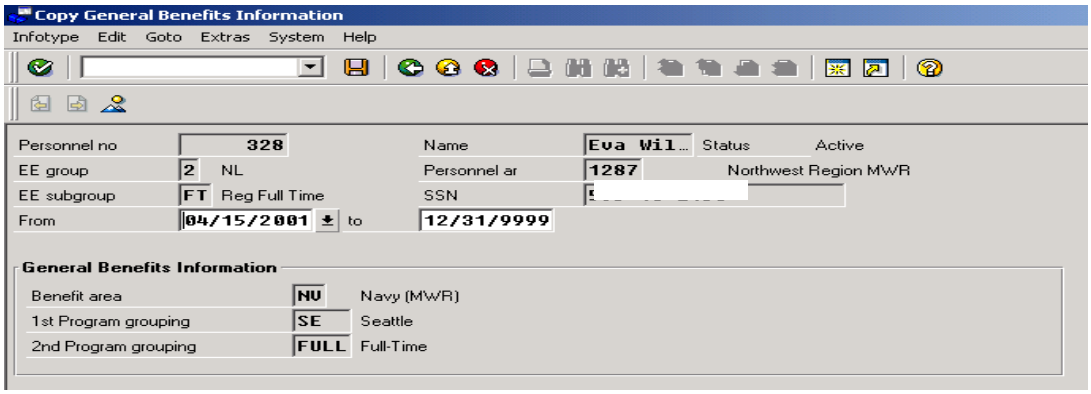
Kronos information-Infotype 9005.



All information will need to be changed for the position change. If Kronos is not being used check the box for "No Badge Necessary". When complete save the information by clicking on the save icon .

General Benefits will be the next infotype.

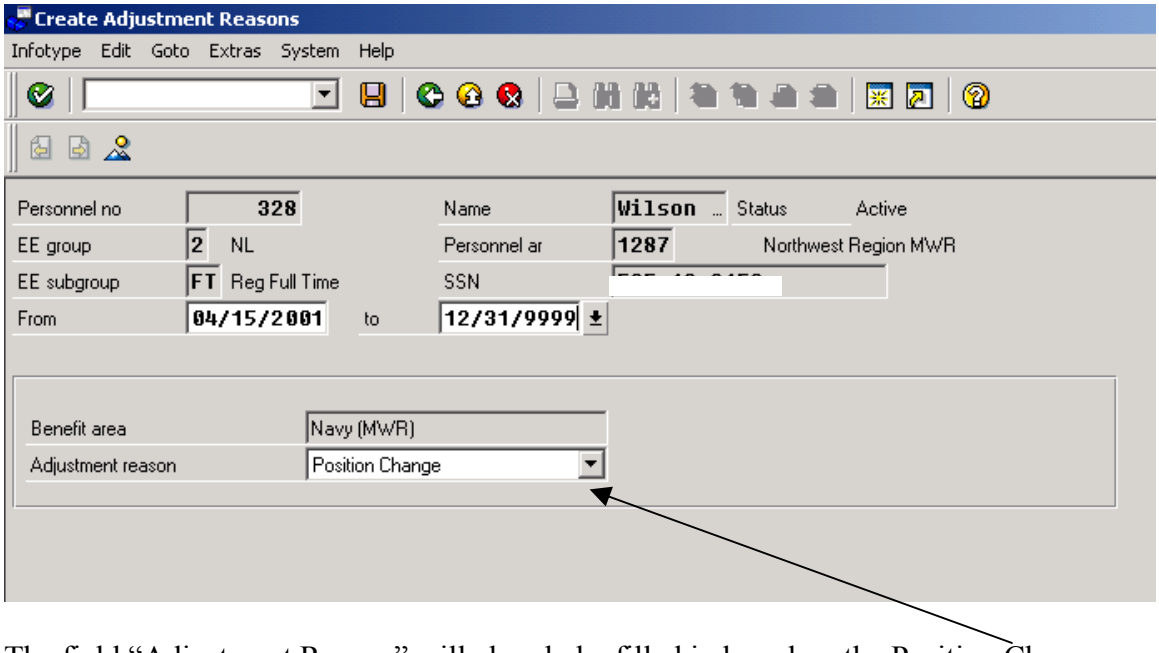
Infotype 0171 – Copy General Benefits Information



No data entry is required. Information will be populated based on the position information. However, this record **must** be saved.

Press the Enter key or click the green checkmark icon to validate the record and Save it.

Infotype 0378 – Adjustment reasons



The field "Adjustment Reason" will already be filled in based on the Position Change action. No entry is required. However, the record **must** be saved.

Press the Enter key or click the green checkmark icon to validate the record and then Save it.

The Personnel Action Screen will be shown and the user receives the message **"Record Created".**

This process is now completed.

Note: If the employee is now eligible for benefits, follow the instructions for Benefit Enrollment.